2020 Utah Visitor Profile & Insights Report

Prepared for the Utah Office of Tourism November 1, 2021

Omnitrak

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KEY TAKEAWAYS

Key Takeaways

1. **Travel demand shifted in 2020, playing to Utah's strengths.** In 2020, the coronavirus pandemic caused nationwide shifts in travel demand, with fewer visitors traveling to visit friends and family and a larger proportion traveling for outdoor recreation. This shift in demand was very evident among travelers to Utah. Although the pandemic caused a decrease in the number of Utah visitors, the percentage visiting for outdoor recreation increased to 26% from 13% the previous year and those visiting friends and family decreased six points to 35%.

2. **Utah's natural resources helped boost domestic market share.** Utah's five national parks and 43 state parks with opportunities for hiking and backpacking catered to the shift in travel demand from the pandemic. While visitor volume fell 19% from the previous year to 16.9 million in 2020, this decrease is substantially lower than the 34% overall reduction in domestic travel. As a result, Utah's market share increased over the prior year to 1.9% of all domestic travel. This increase in market share demonstrates that Utah holds a competitive advantage with outdoor recreational activities compared to competing regional states.

3. **Niche activities continued to motivate Utah travel and generate revenue.** For Utah, the most lucrative niche activity segments continue to be those driven by Utah's unique outdoor features. These segments tend to spend more and stay longer, making them an important source for industry revenue and taxes. Particularly, the Adventure Seekers and State/National Parks activity niches, with each potentially generating around a fifth of total Utah trip spend. The Utah Office of Tourism can capitalize on recent momentum among these niche segments by targeting Western markets in closer proximity (i.e., Los Angeles, Phoenix, and Seattle), as well as farther away markets (i.e., NYC, Chicago, etc.) that are home to a large portion of these niche travelers.

4. **Utah's tourism offerings increase first-time visitors.** While most visitors during 2020 had previously travelled to Utah, first-time visitation increased from 15% to 20% of total arrivals. This increase has brought Utah to a ratio comparable to competing regional states. With natural parks such as Zion, Moab, and Bryce Canyon attracting out-of-state visitors, Utah's natural resources brought in more first-time visitors due to the shift in travel demand.

REPORT OVERVIEW

Report Overview

Brand/History

Utah Office of Tourism

- 8th Report for Utah Office of Tourism
- Continuous online data collection via TravelTrak America

Visitor Type

Visitors to the State of Utah by type and purpose of trips:

- Overnight
- Day
- Business
- Leisure
- Residents
- Non-Residents

Profile

Visitor Characteristics:

- Source markets: State, DMA
- Demographics: age, children, income, etc.

Trip Characteristics:

- Spending on Utah trip
- Length of stay
- Activities – including visitor profiling by niche activity
- Transportation
- Quarterly trends

Benefits

Niche Activity Visitor Segments:

Understand visitor segments generating the highest yield within the state, where they come from, and their reasons for visiting

Competitive Analysis:

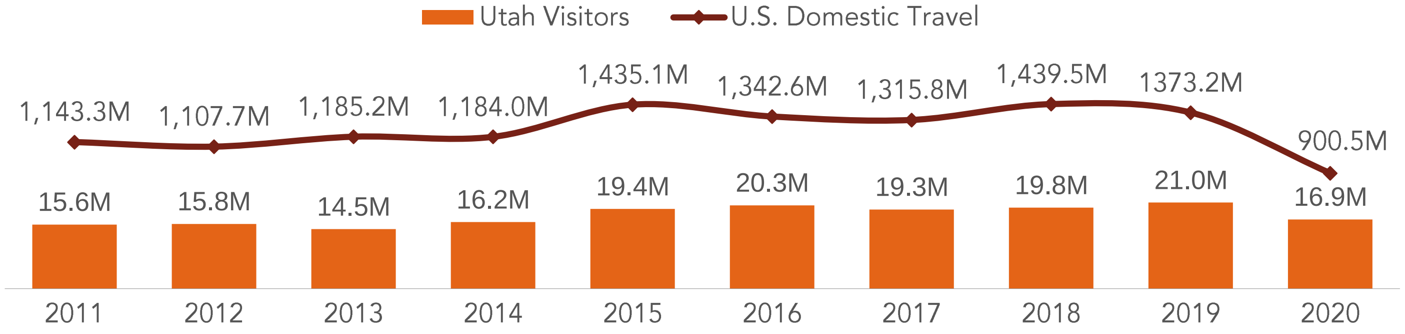
Comparison of visitors to competitor states (Colorado, Arizona, Idaho, Wyoming, Montana, and Nevada) on market share, intent to visit, length of stay, satisfaction, spending, demographics, etc.

EXECUTIVE SUMMARY

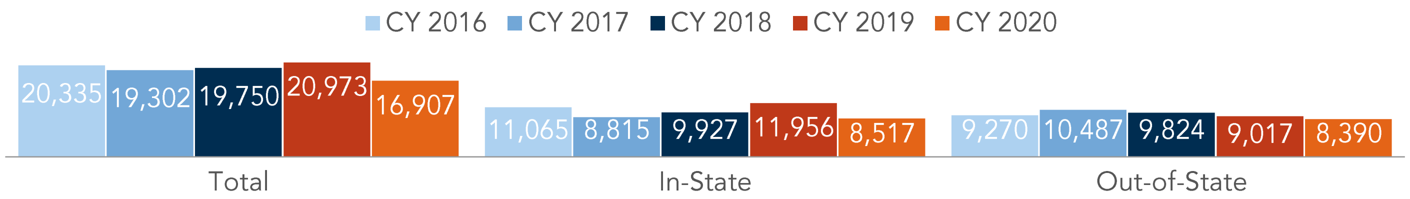
Utah’s visitor volume suffers loss due to COVID but to a lesser extent than the U.S. overall

- Utah’s visitor volume fell to 16.9 million in CY 2020 from a high of nearly 21.0 million the previous year. This 19% decrease can be attributed to the coronavirus pandemic. During the same period, domestic travel within the U.S. declined by around 34%.
- The coronavirus outbreak had a negative impact on both in-state and out-of-state Utah visitation, compared to the previous year. However, Utah’s in-state visitation experienced a greater decline at -29% than its out-of-state visitation at -7%.
- Utah’s leisure and business visitor volume decreased by -17% and -10%, respectively, while visitor volume among those traveling for other purposes (i.e., medical, education, personal business, etc.) fell -43%.

Domestic Travel Trends within U.S. and Utah
(in person-trips; in millions)



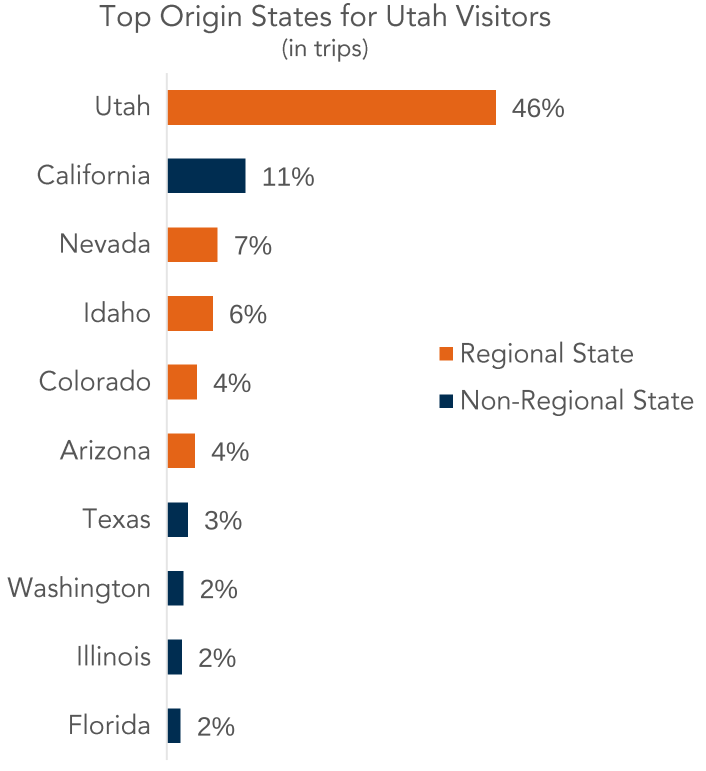
Utah Visitor Volume by Visitor Type
(in person-trips; in thousands)

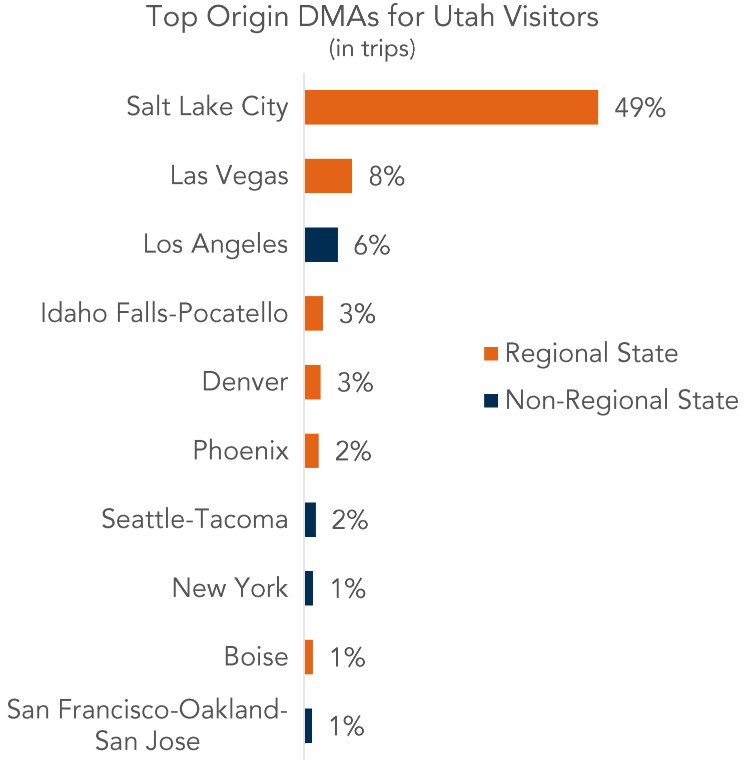


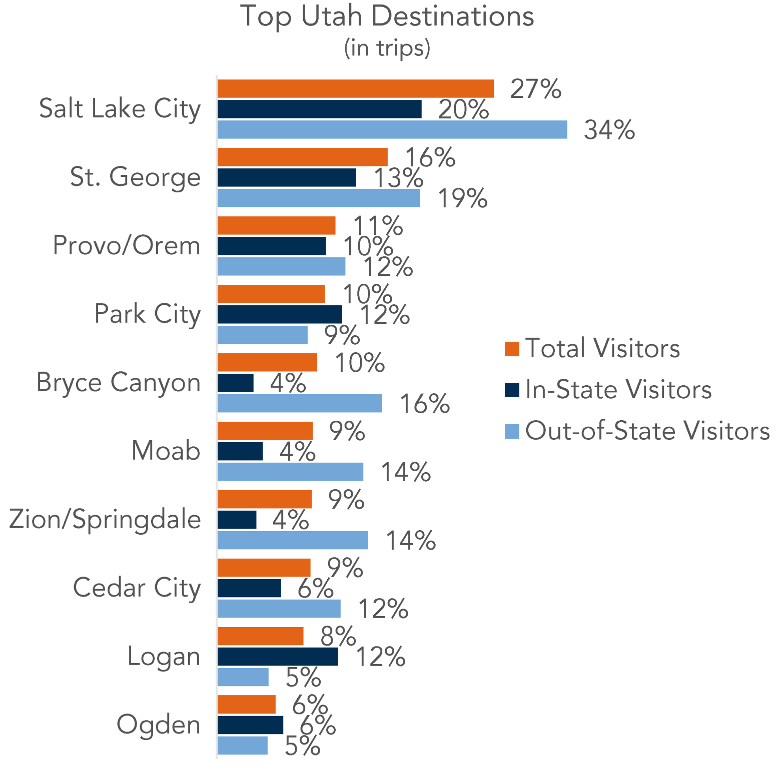
Leisure:	16,672	16,732	14,894	17,127	14,208	9,085	7,776	7,645	9,236	7,338	7,351	8,955	7,249	7,891	6,870
Business:	1,142	1,177	1,045	1,558	1,401	524	396	263	1,112	224	954	780	782	446	1,177
Other:	2,949	1,393	3,811	2,288	1,298	2,058	683	2,019	1,608	954	965	752	1,793	680	343

Proximity influences travel—where visitors come from and where they go

- Utah primarily draws travelers from within its own borders, with Utah residents accounting for nearly half (46%) of the state's visits in CY 2020. Nearby regional states and their respective cities continue to dominate as out-of-state source markets.
- Travelers continue to flock to Utah's largest cities, regardless of where they live. However, Utah's out-of-state visitors are much more likely to include Salt Lake City, Bryce Canyon, Zion/Springdale, and Moab in their trip itinerary than in-state visitors.







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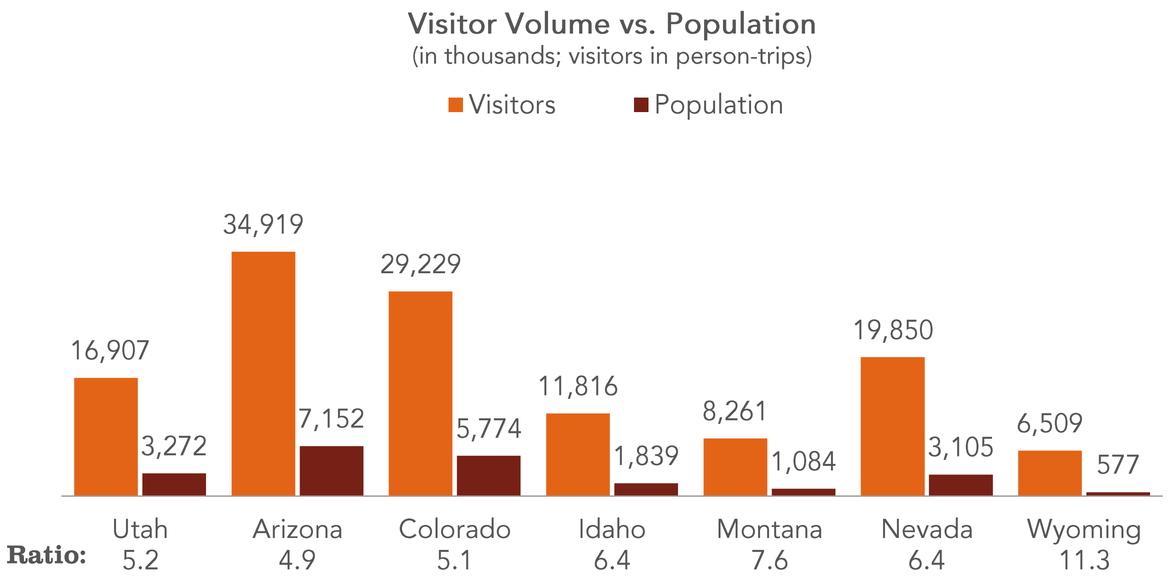
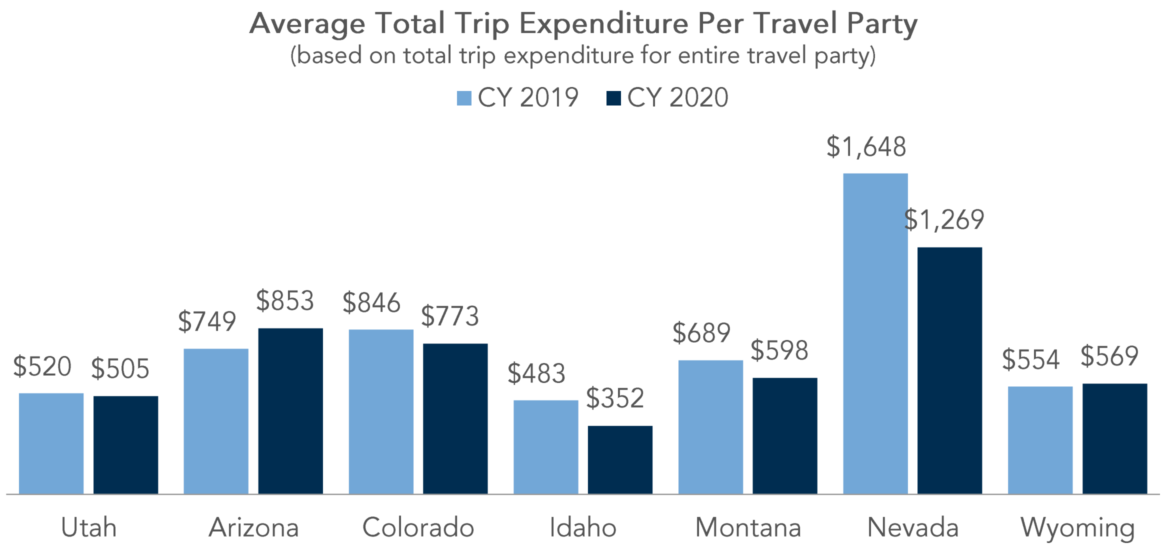
Tourism generates revenue for Utah

- The ratio of visitors an area receives relative to its resident population can be used to help provide an indication of tourism's relevance, as well as function as an early indicator of over tourism. As the visitor to resident ratio rises, increased focus must be placed on growing responsible travel to the state.
- With 5.2 visitors per resident, Utah ranks 5th among the competitive states in its region.
- States, cities and local areas benefit financially from the tourism industry. Tourism not only generates revenue directly for industry businesses that employ residents, but it also produces revenue in taxes (e.g., sales, lodging) that contribute to government coffers.
- Despite the pandemic, Utah visitors spent nearly the same amount on their visit as the previous year, with their average expenditure only 3% lower at $505 per travel party per trip only.





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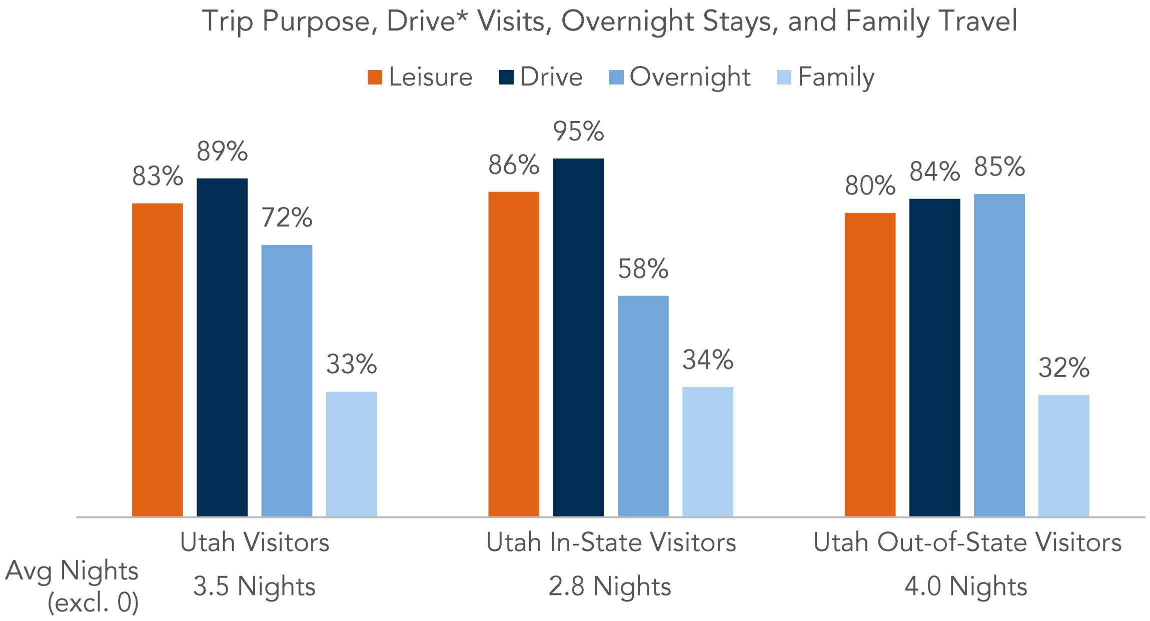
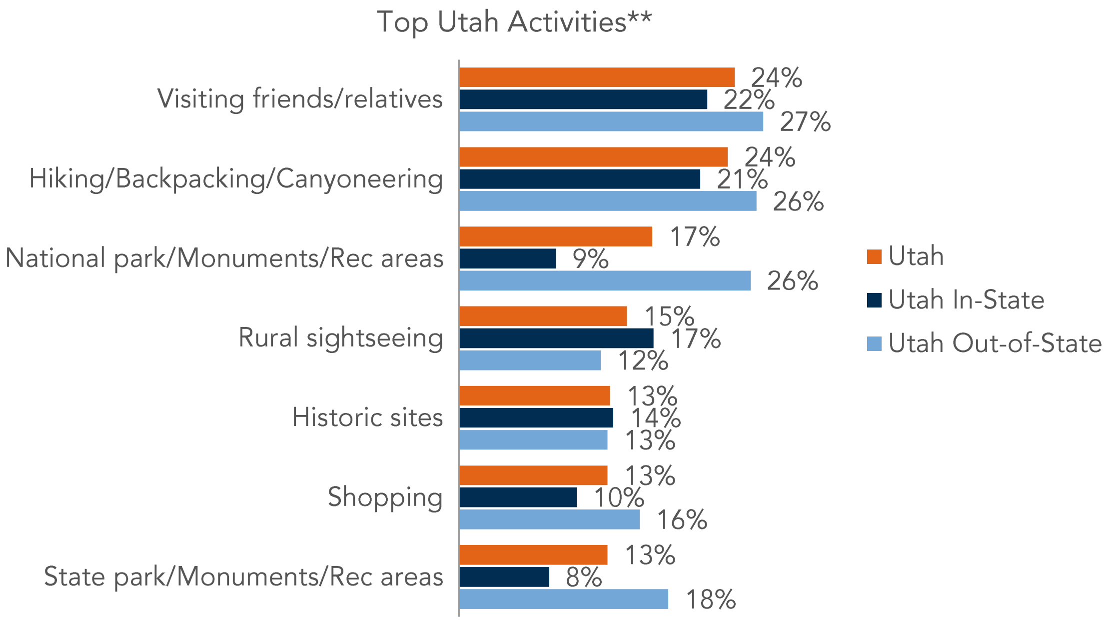
Most travelers visit Utah for leisure, drive, and stay overnight—with many enjoying Utah's abundant outdoor features

- Leisure travel continued to dominate Utah's tourism industry during CY 2020, representing 83% of visits to the state.
- Utah's out-of-state visitors were more likely to stay overnight than in-state visitors (85% vs 58%) and stay more nights.

- Although visiting friends/relatives remains the top activity among all Utah visitors, outdoor activities—including hiking/backpacking, national parks, rural sightseeing, and state parks—continued to be important among Utah's out-of-state visitors.



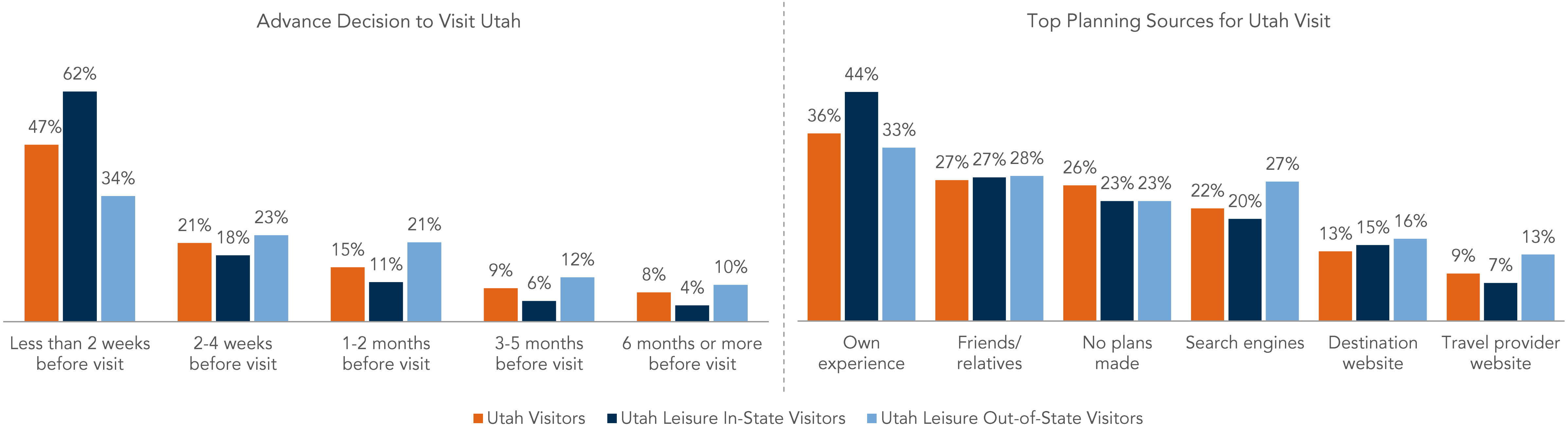


*Reflects transportation to state starting in 2020 and is not comparable to prior years; drive includes own/rental vehicle, camper/RV, or motorcycle.
**Top percentages reflect any participation and not the activity as a motivation their trip

Distance impacts Utah visitors timing of travel decisions and the sources they use when planning travel

- Nearly two-thirds (62%) of Utah's in-state visitors decided on their trip less than 2 weeks before traveling, while Utah's out-of-state visitors began planning their trip farther out—with 43% deciding on travel plans a month or more out.

- Utah's out-of-state visitors rely on a greater variety of external sources for planning their travel, particularly search engines (27%), destination websites (16%) and travel provider websites (13%), than in-state visitors who are more likely to rely on their own experience (44%).



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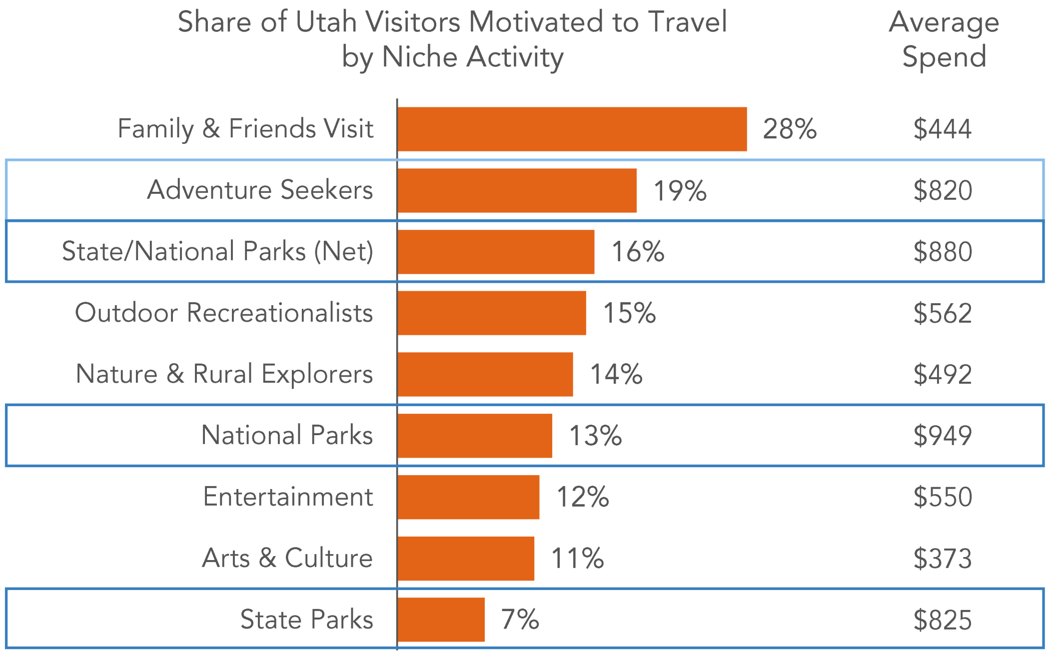
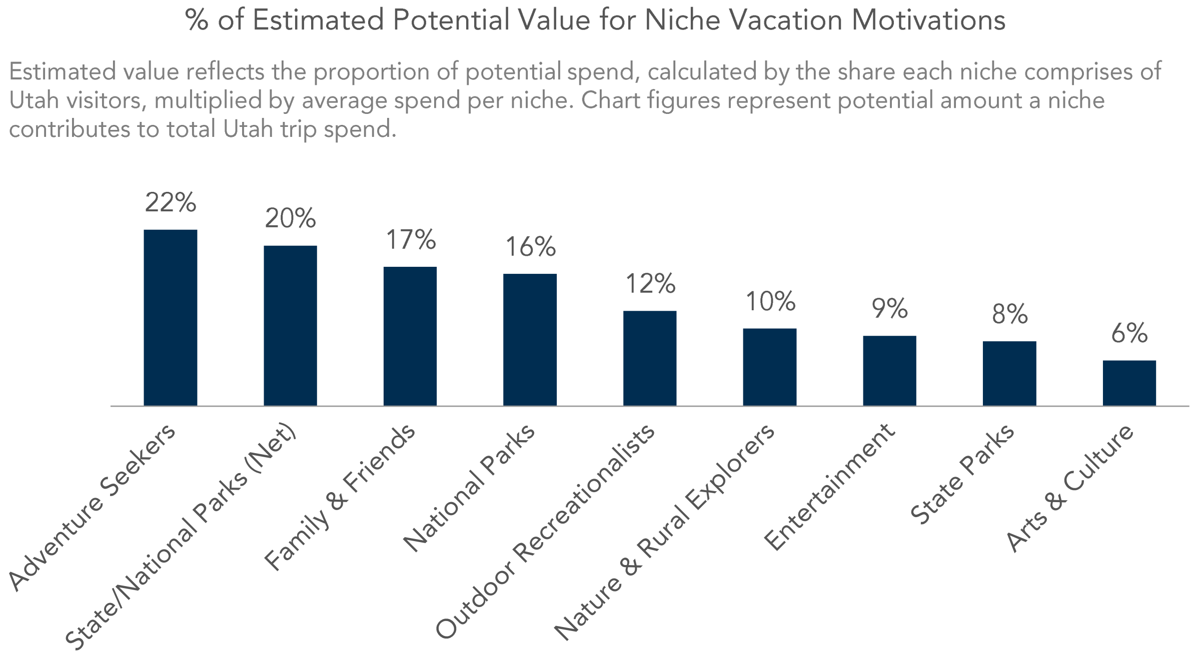
Niche activities motivate travel and generate spend

- Niche activities motivate travel to Utah and generate spend, particularly those capitalizing on Utah's unique outdoor features, such as, the State/National Parks and Adventure Seekers niches. Utah's visitors motivated by these niches represent a sizable portion of Utah's visitors and land in the top three for highest average spend per trip.

- Combining trip volume with spending provides a guide to help determine the most lucrative niche segment. This model indicates that outside of friend/family travelers, both the Adventure Seekers niche and State/National Parks niche are the most lucrative visitor segments for Utah, followed by the Family & Friends niche.



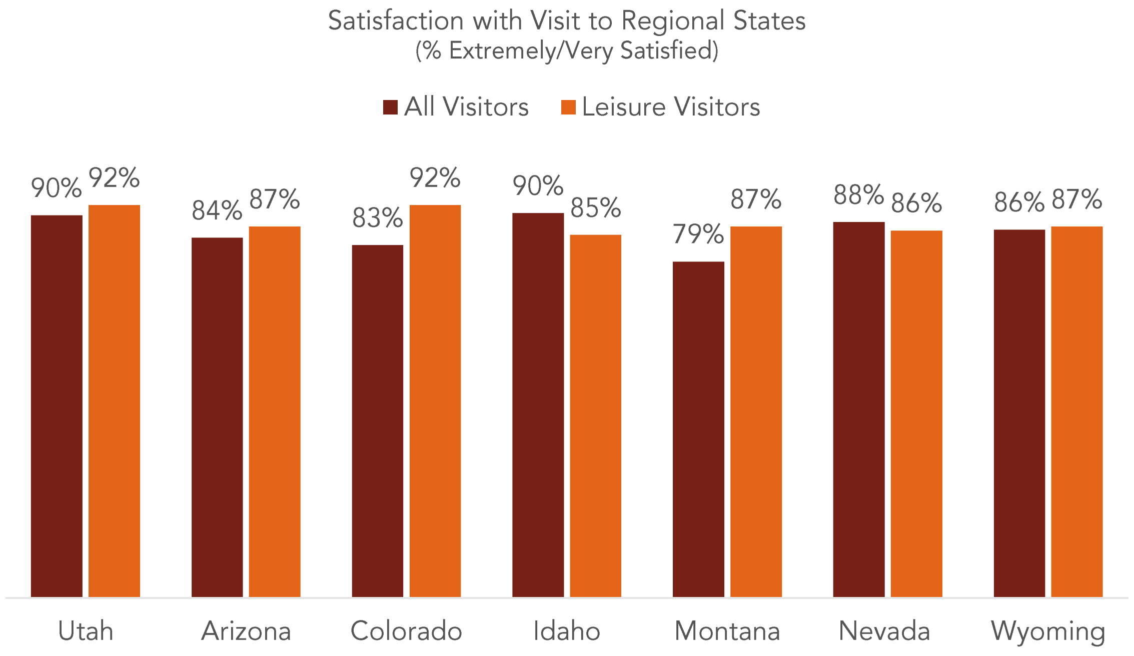


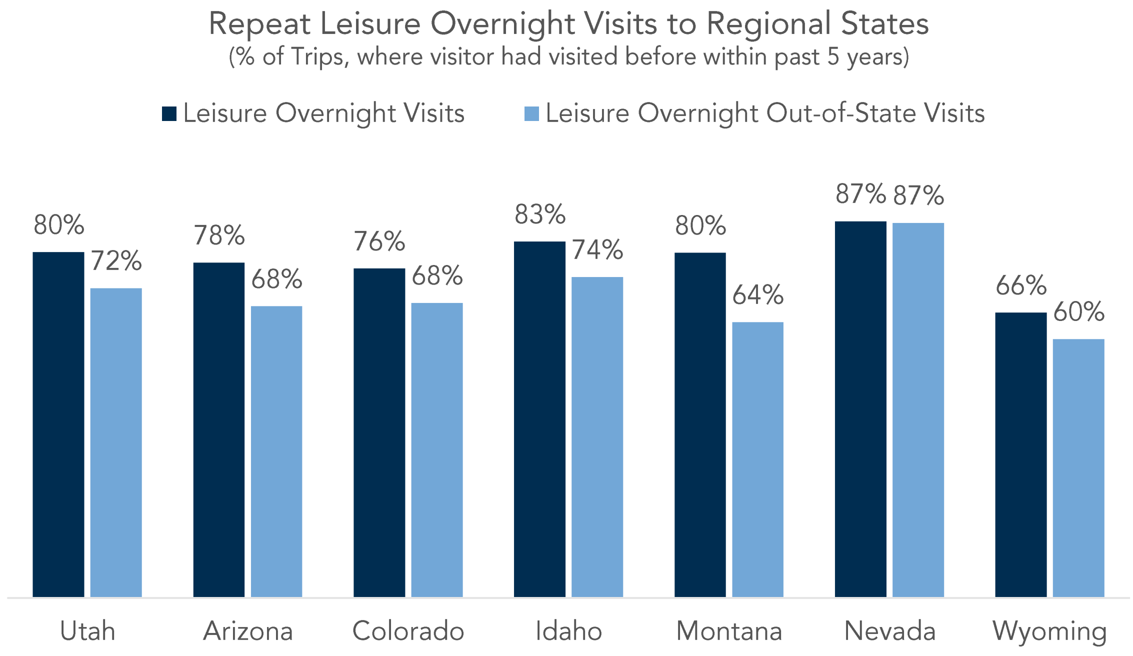
Note: niche activity figures reflect Utah visitors who said an activity within a niche category was a primary/secondary reason for their visit (see glossary for niche definitions); since it is possible an activity as a primary reason and secondary reason for visiting to fall within different niches, some overlap will exist

Utah sends leisure visitors home happy, which strengthens visitors' desire to return

- Overall, 90% of Utah's leisure visitors report being extremely or very satisfied with their visit to the state. This level of satisfaction was also reported by out-of-state leisure visitors, putting Utah at the top of its competitive set for visitor satisfaction.

- Repeat visitation can indicate a destination's ability to retain leisure travelers. With repeat visits representing 80% of Utah's leisure overnight visits and 72% of its leisure overnight out-of-state visits, Utah performs well among competitor states.





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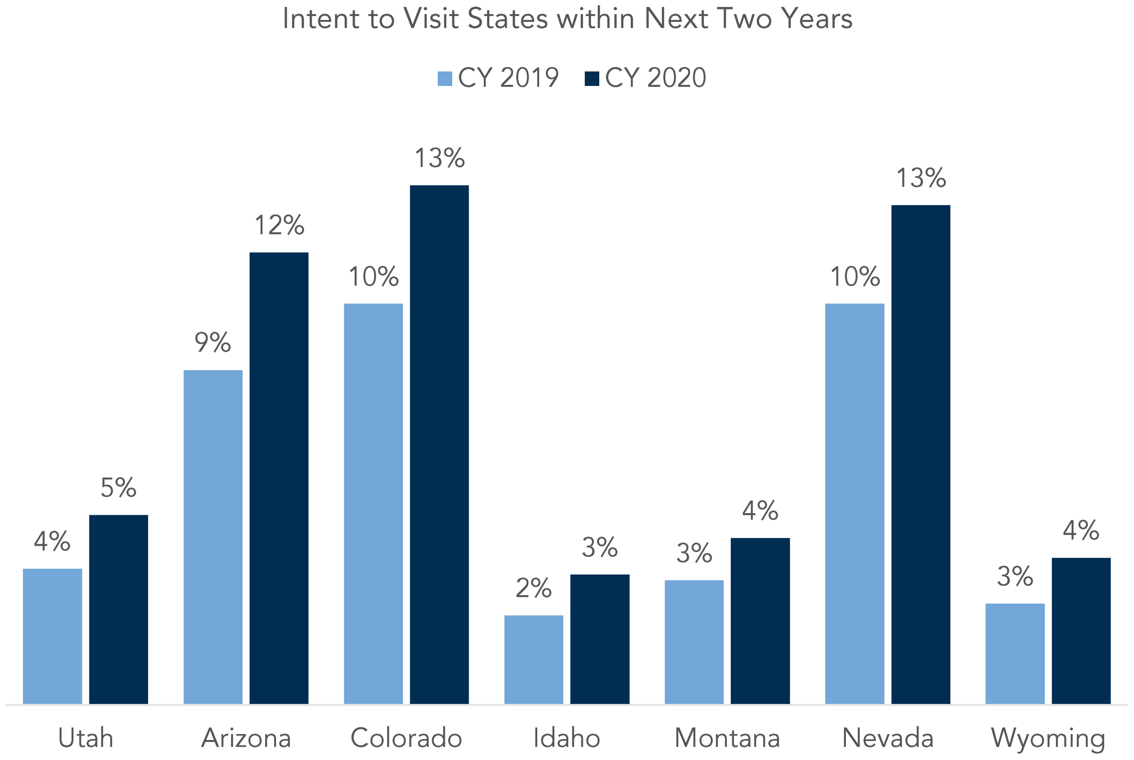
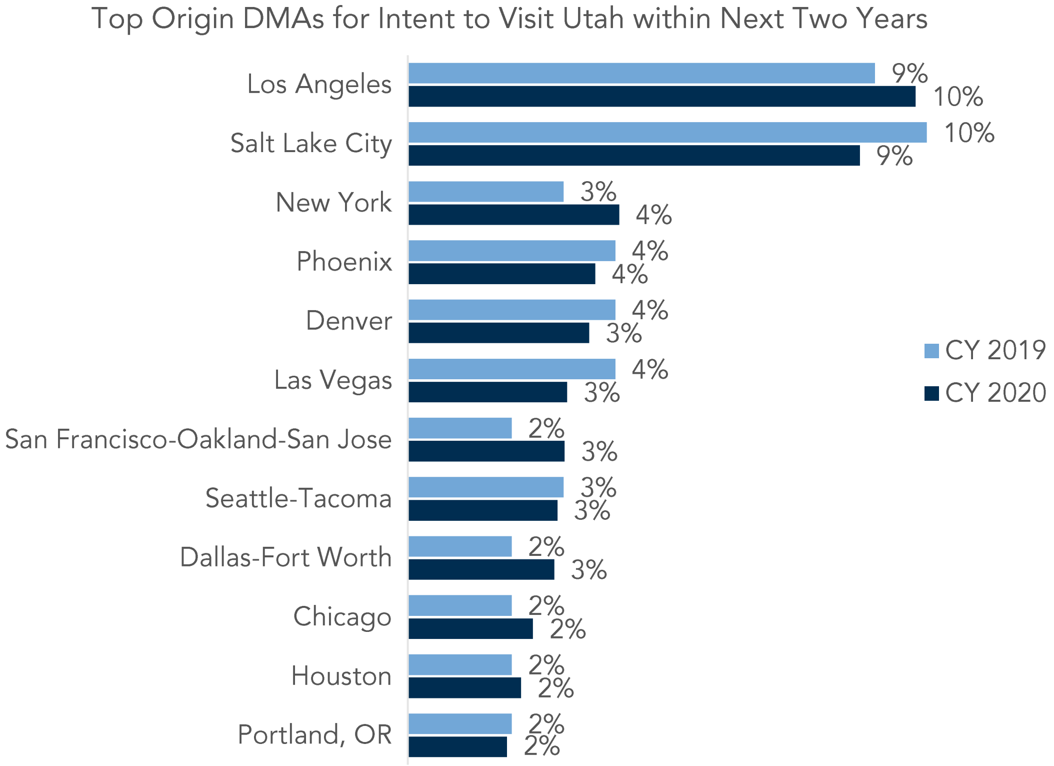
Travel intention increases for Utah and nearby competitors

- Pent up travel demand, resulting from the coronavirus pandemic which brought travel to a grinding halt, is likely a contributing factor to the increase in future travel intentions observed for Utah and its competitor states.
- The top DMA market for intent to visit Utah is outside state lines, with 10% of Los Angeles residents reporting that they intend to visit Utah within the next two years, while travelers residing in Utah's own Salt Lake City reported the second highest intent





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Detailed Results

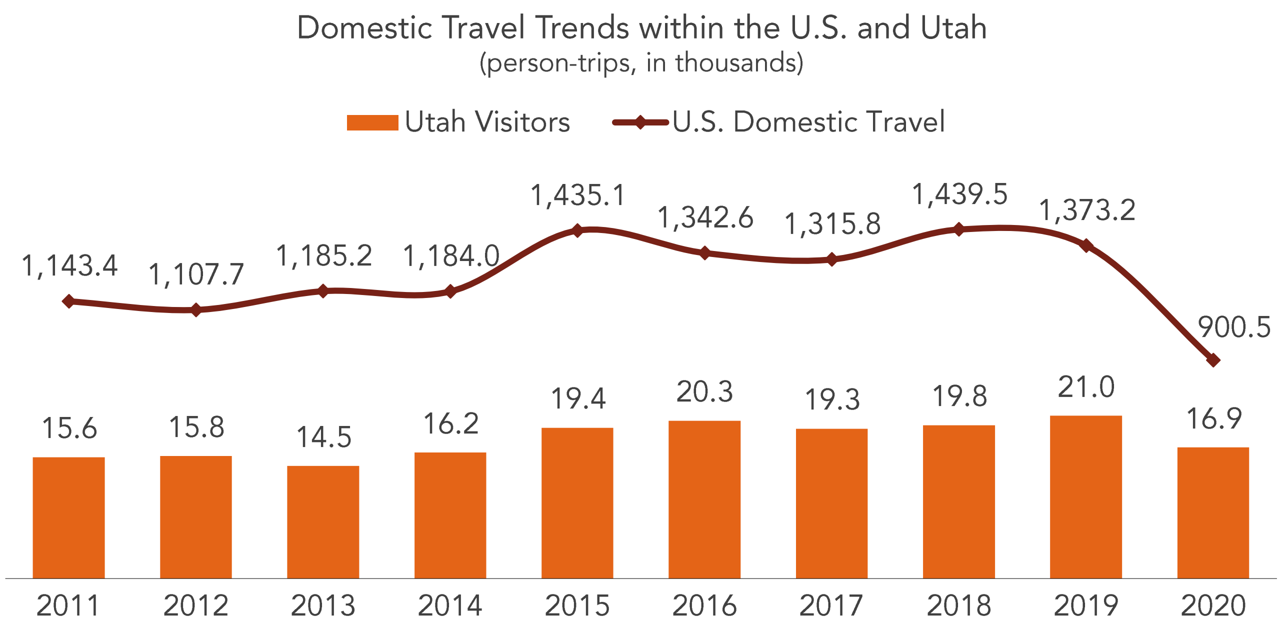
Share of Visitors

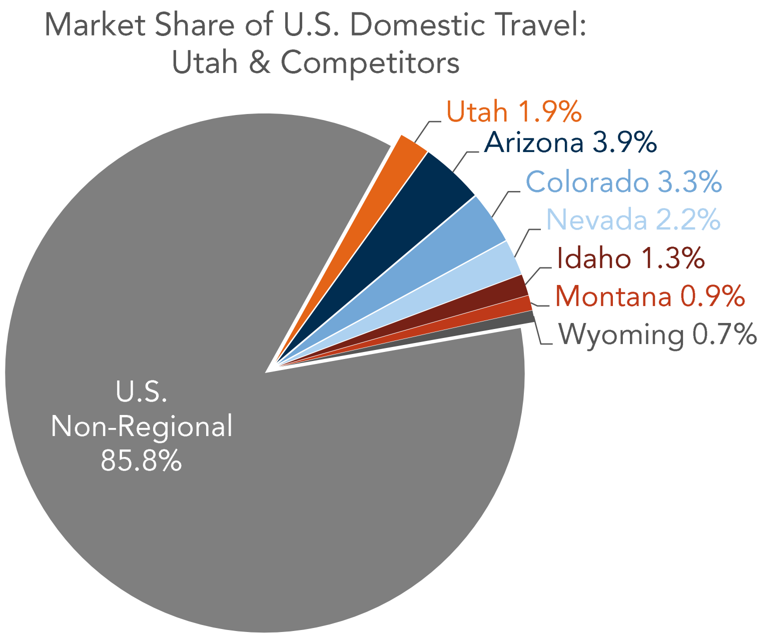
Utah welcomed an estimated 16.9 million visitors in CY 2020

Market Overview:

- Utah hosted 16.9 million travelers in CY 2020, a decrease of 19% from the previous year. At the same time, domestic travel within the U.S. fell 34%.
- Travel to Utah accounted for 1.9% of total domestic travel within the U.S. during 2020, which is an increase in market share from the previous year.

Utah Population Census Estimate	Utah Households Census Estimate	Utah Visitors CY 2020
3,271,616	977,313	16.9 million

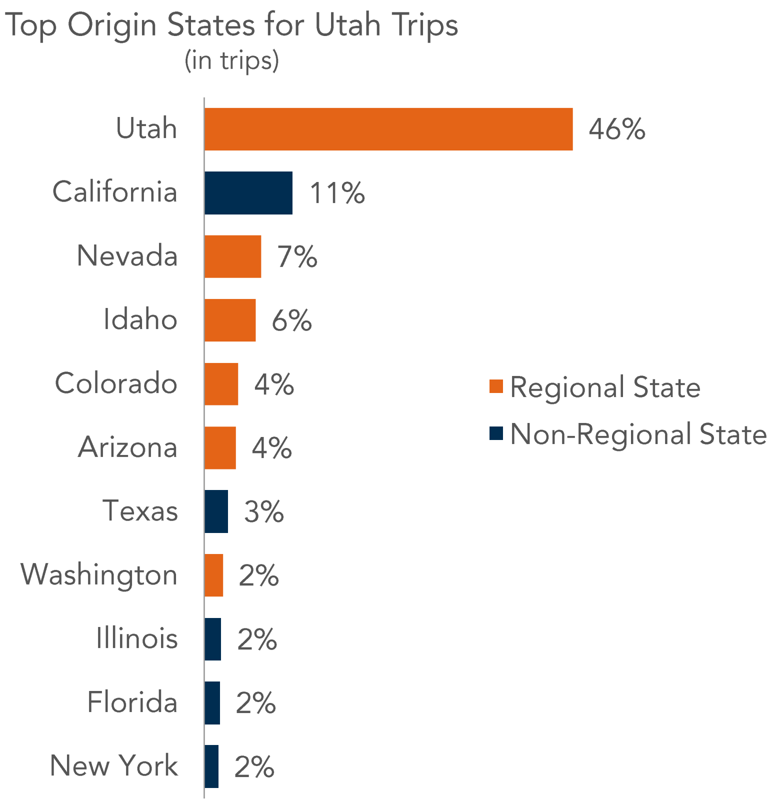


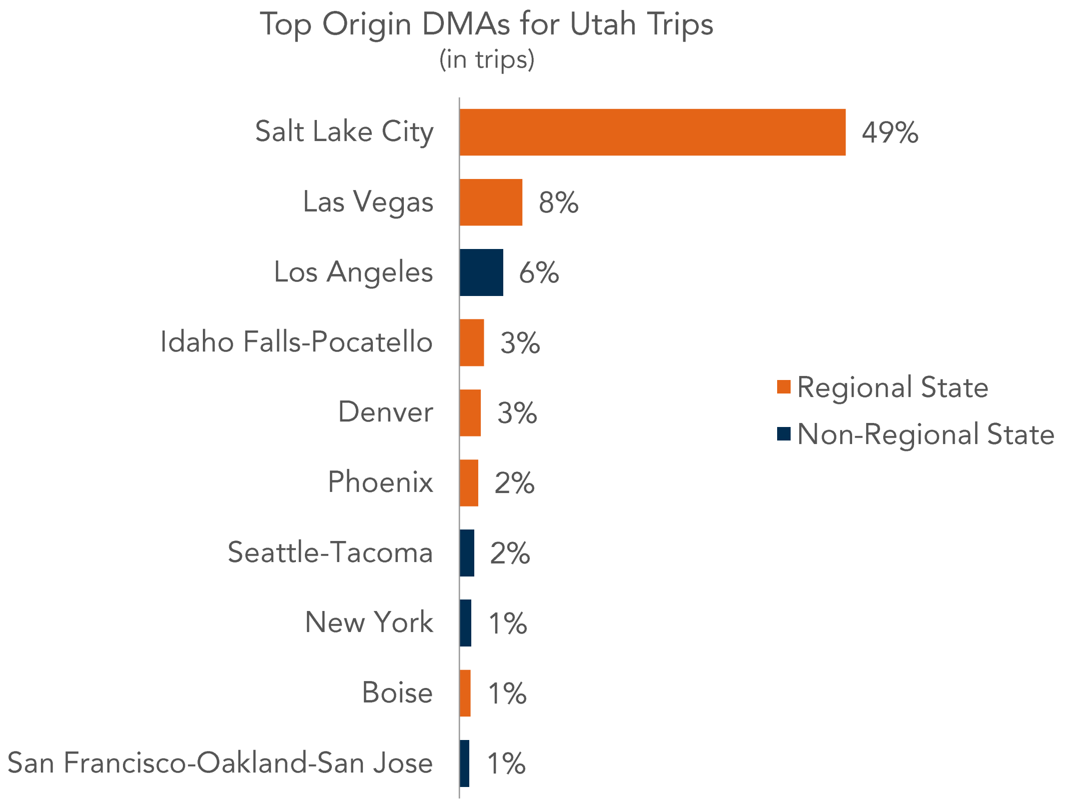


Sources: TravelTrak America - Q4a. U.S. state(s) visited (in person-trips)

Source Markets & Trip Types

Proximity influences travel, with nearby and border states as well as their respective cities continuing to dominate out-of-state source markets





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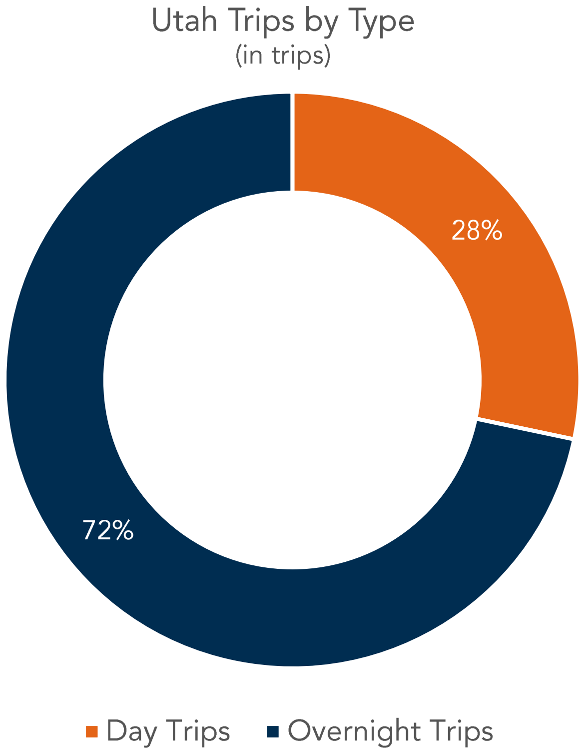
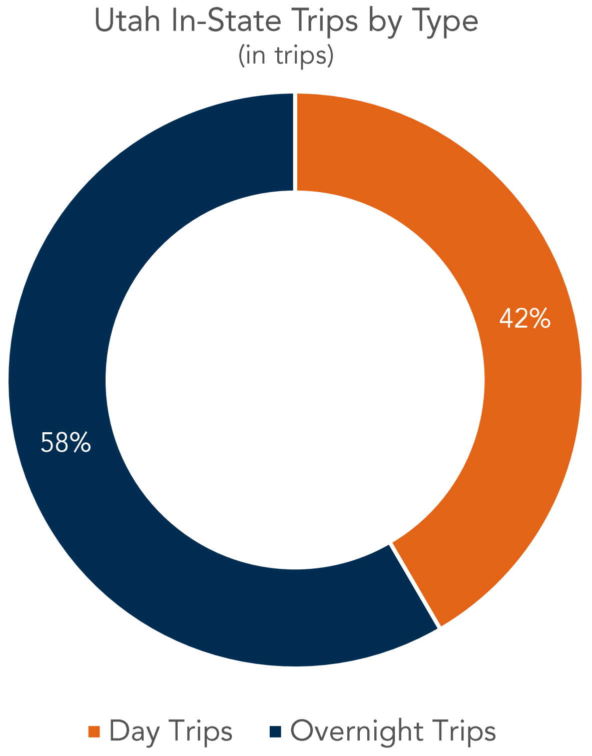
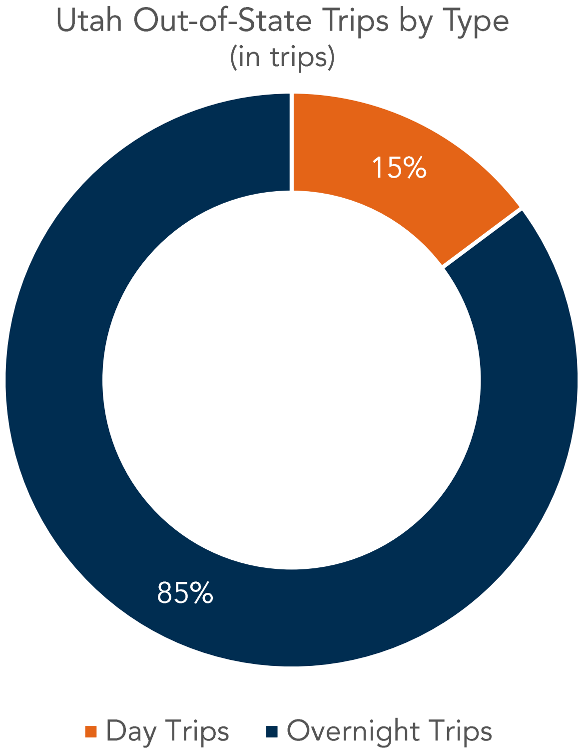
Note: DMAs reflect 2019-20 data to increase sample and stabilize fluctuations from circumstances (e.g., wildfires, hurricanes, etc.) and not actual changes in behavior

Overnight trips continue to be the most common trip type, particularly among Utah's out-of-state visitors

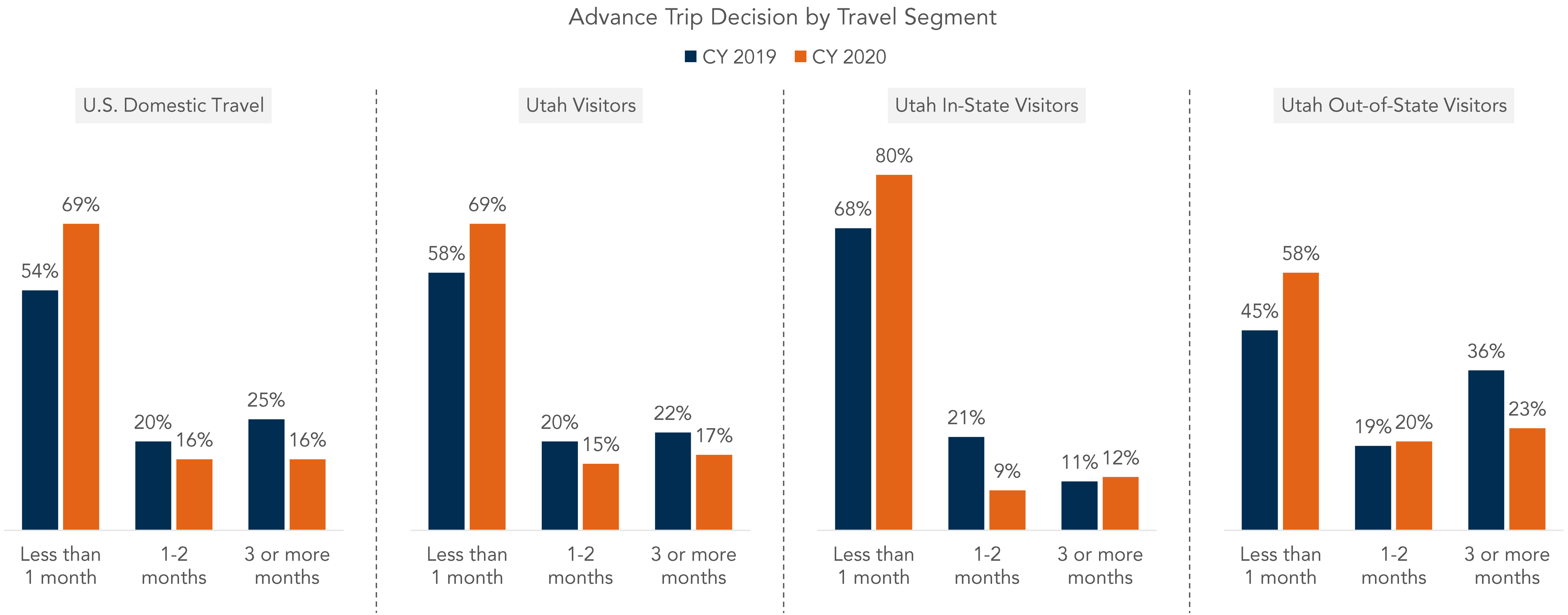






Trip Timing & Planning

Travel decisions shorten but distance still impacts timing



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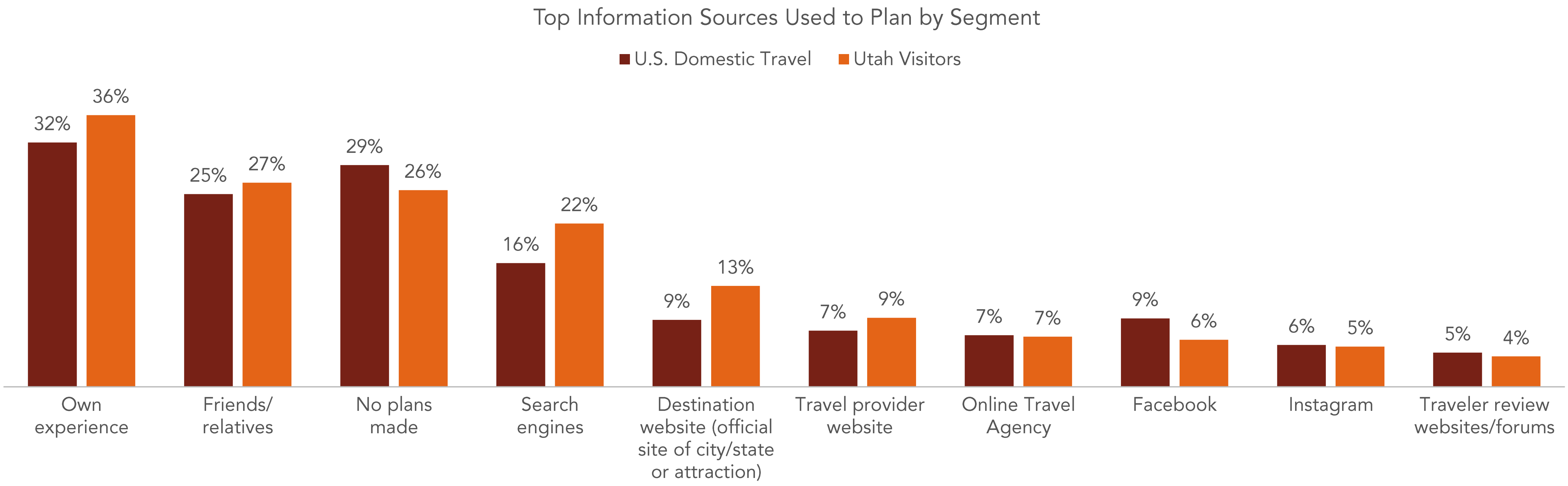
Distance still impacts timing

- More than half of Utah's in-state visitors considered (52%) and decided (61%) on their trip less than 2 weeks before their trip. At the same time, majority of Utah's out-of-state visitors began planning their trip farther in advance, with 55% considering and 43% deciding on travel plans a month or more before taking their trip.

Trip Decision Timing	U.S. Domestic Travel		Utah Visitors		Utah In-State Visitors		Utah Out-of-State Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors	
	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020
Considered												
Less than 2 weeks before visit	33%	42%	39%	41%	48%	52%	26%	29%	29%	29%	53%	72%
2 – 4 weeks before visit	18%	20%	16%	18%	17%	20%	15%	16%	20%	20%	17%	10%
1 – 2 months before visit	20%	18%	21%	17%	22%	12%	20%	22%	20%	21%	16%	10%
3 – 6 months before visit	13%	10%	11%	12%	4%	9%	19%	16%	13%	14%	8%	4%
6+ months before visit	13%	11%	14%	13%	9%	8%	20%	17%	19%	15%	6%	4%
Decided												
Less than 2 weeks before visit	35%	49%	42%	48%	53%	61%	28%	34%	34%	38%	58%	77%
2 – 4 weeks before visit	19%	20%	16%	21%	15%	19%	17%	24%	18%	24%	19%	9%
1 – 2 months before visit	20%	16%	20%	15%	21%	9%	19%	20%	21%	19%	11%	8%
3 – 5 months before visit	13%	8%	11%	9%	4%	6%	20%	13%	13%	10%	7%	4%
6+ months before visit	12%	8%	11%	8%	7%	6%	16%	10%	14%	9%	5%	2%

Most travelers rely on their own experience to plan travel but advice from people they know remains important



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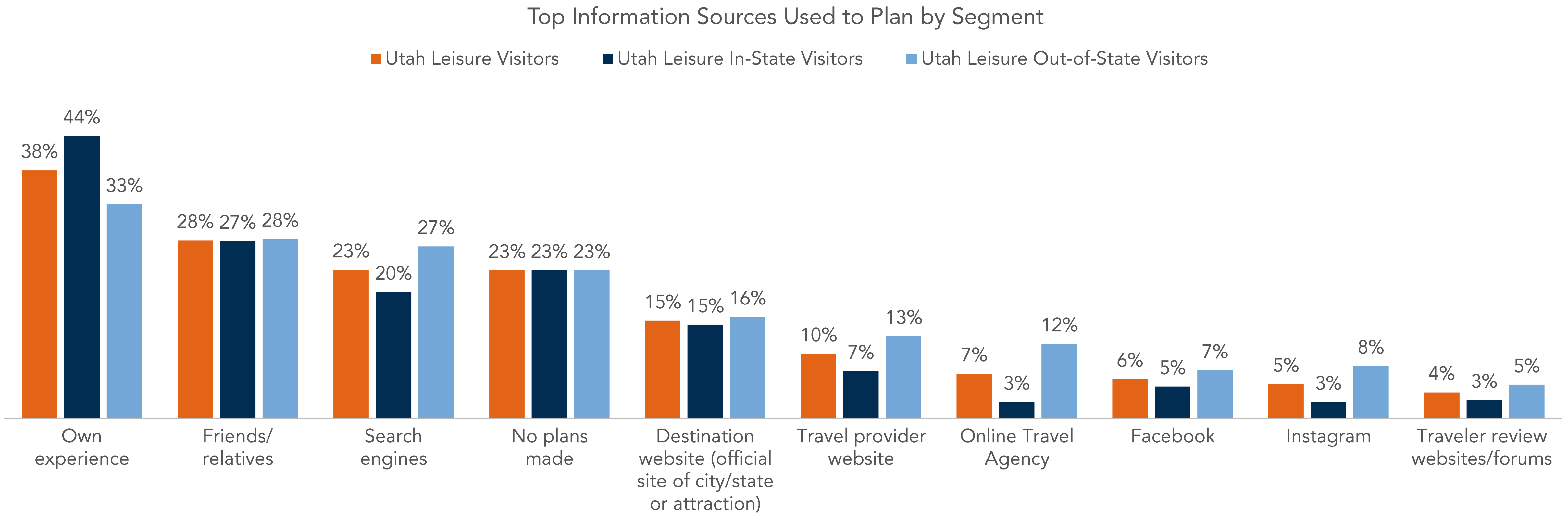
Leisure travelers from outside the state visitors rely on a greater variety of external sources



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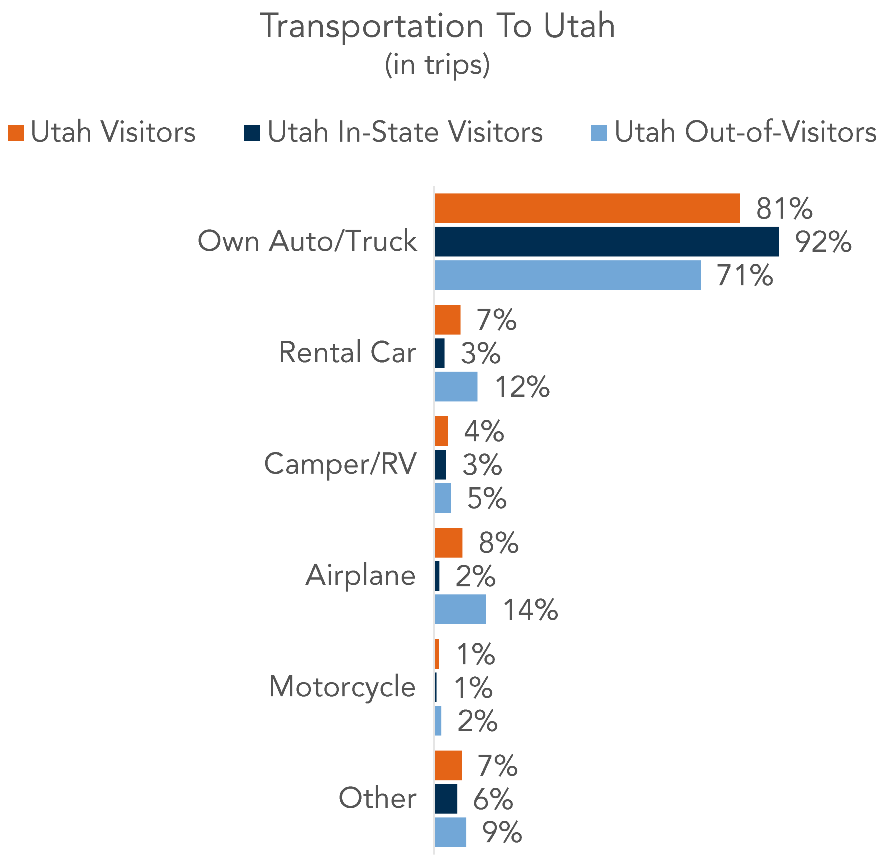
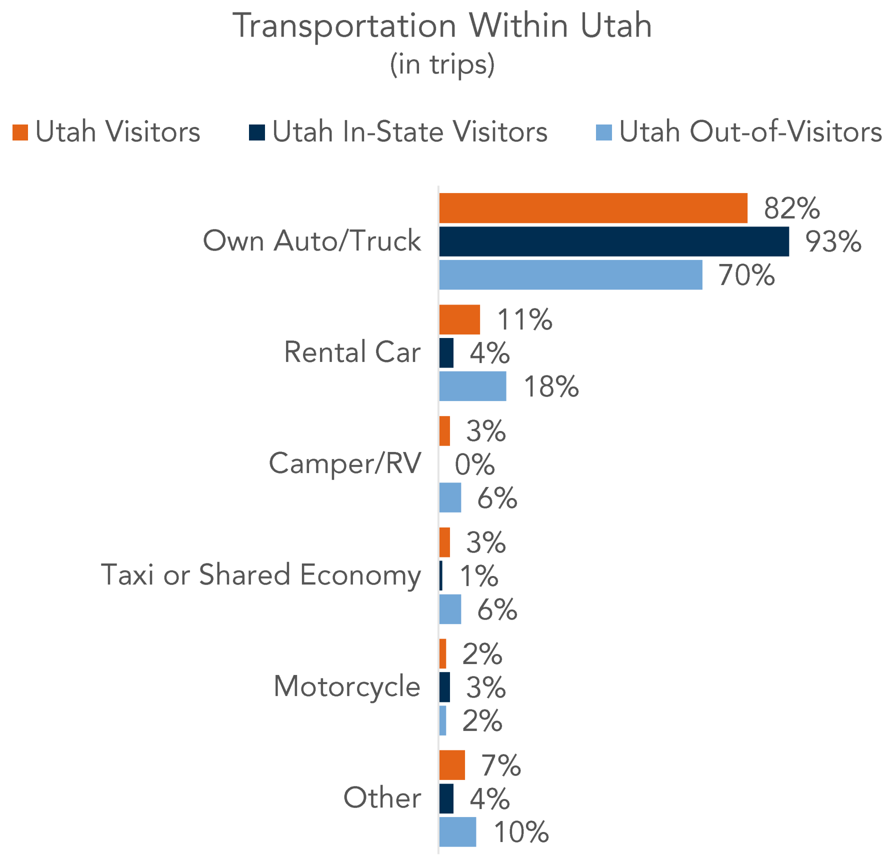
TRIP CHARACTERISTICS

Travel for outdoor recreation expands, while travel for visiting friends and relatives weakens, compared to the previous year

	U.S. Domestic Travel		Utah Visitors		Utah Leisure Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors		Utah Leisure In-State Visitors		Utah Leisure Out-of-State Visitors	
	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020
Primary Trip Purpose (in trips)														
Leisure (net)	79%	77%	75%	83%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Visit Friends/Relatives	44%	41%	41%	35%	55%	43%	58%	41%	53%	47%	57%	38%	53%	47%
Outdoor Recreation	9%	12%	13%	26%	17%	31%	18%	34%	13%	26%	15%	37%	18%	26%
Entertainment/Sightseeing	13%	10%	11%	12%	15%	14%	11%	13%	18%	14%	14%	11%	16%	18%
Other Personal	14%	14%	10%	10%	14%	12%	12%	12%	17%	13%	14%	14%	13%	9%
Personal Business	8%	7%	7%	6%	~	~	~	~	~	~	~	~	~	~
Business (net)	10%	11%	14%	9%	~	~	~	~	~	~	~	~	~	~
Other	3%	4%	4%	3%	~	~	~	~	~	~	~	~	~	~

Proximity influences how travelers get to Utah





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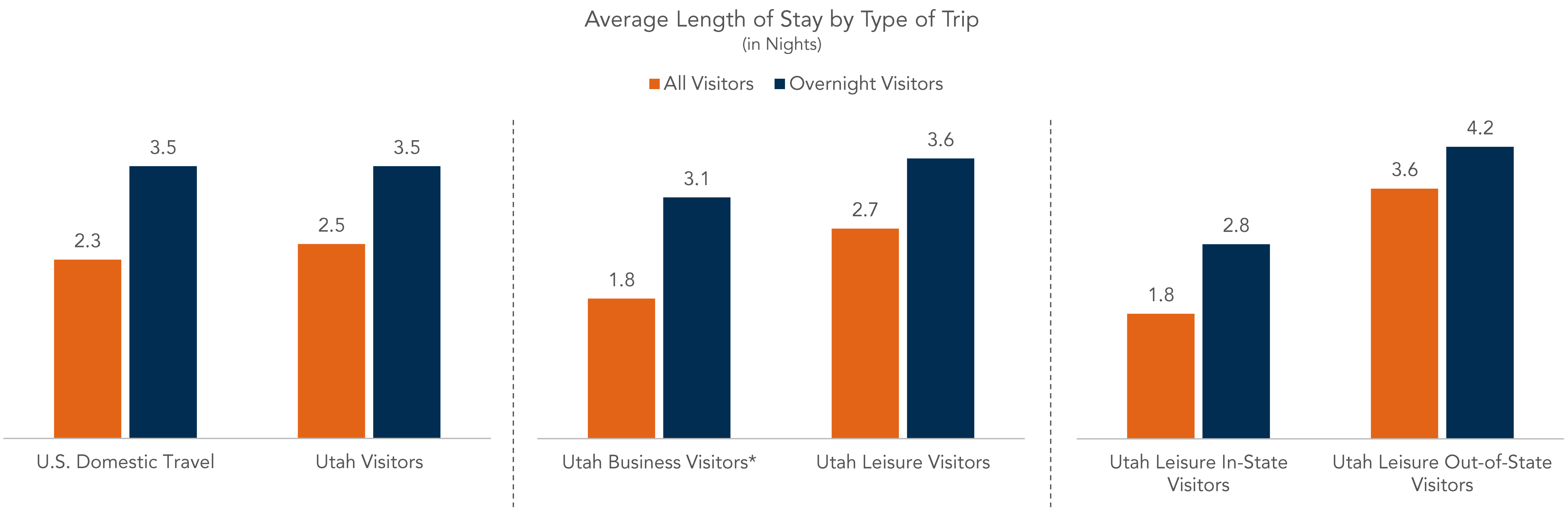
Leisure travelers visiting from out-of-state stay longer in Utah on average than in-state visitors

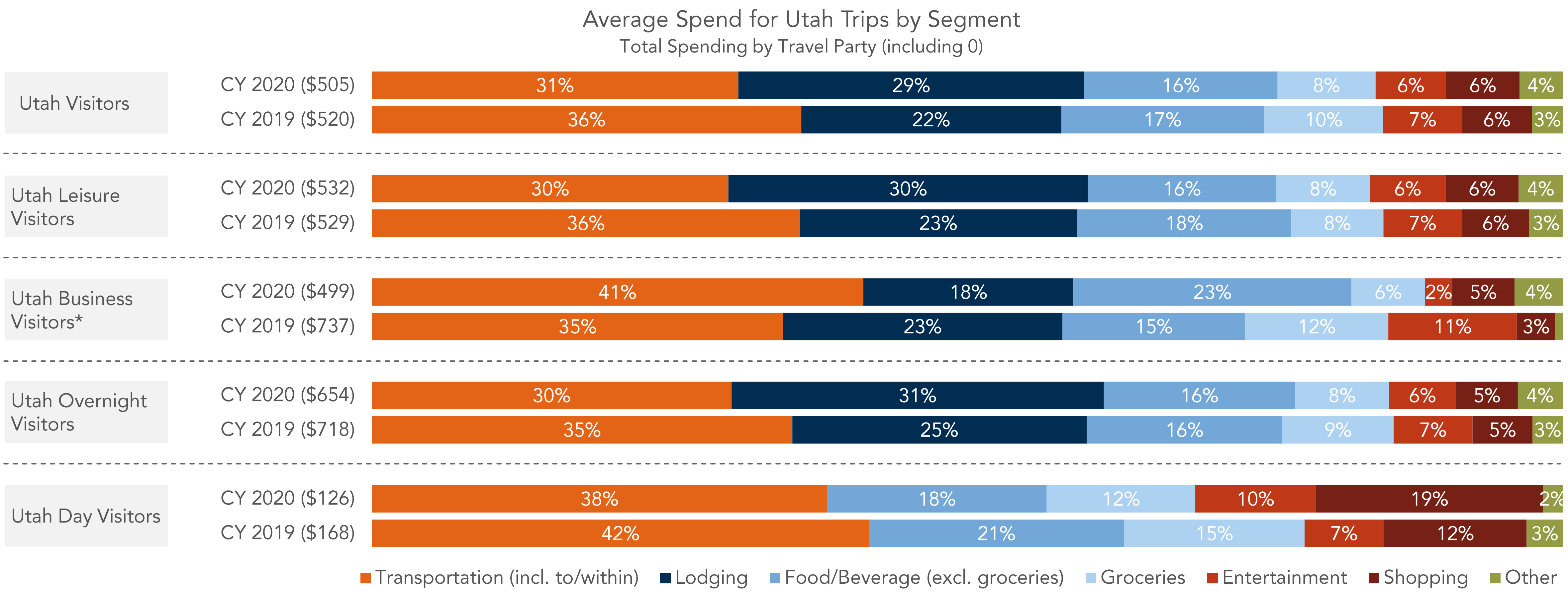


Note: U.S. Domestic Travel averages based on stays in each state, not entire length of trip that includes multiple states
*Small sample size

Family travel to and within Utah weakens, particularly among in-state visitors

	U.S. Domestic Travel		Utah Visitors		Utah Leisure Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors		Utah Leisure In-State Visitors		Utah Leisure Out-of-State Visitors	
	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020
Average Travel Party Size	2.6	2.7	3.2	3.0	3.3	3.1	3.2	3.1	3.5	2.8	3.4	3.1	3.1	3.0
Adults in Travel Party														
One Adult	30%	29%	21%	18%	17%	15%	17%	18%	15%	5%	17%	13%	15%	17%
Two Adults	53%	54%	58%	65%	62%	66%	61%	61%	66%	81%	64%	73%	60%	58%
Three Adults	9%	9%	11%	10%	11%	10%	11%	11%	11%	10%	12%	9%	9%	12%
Four or More Adults	8%	8%	10%	8%	11%	9%	12%	10%	8%	4%	7%	5%	16%	12%
Family Travel														.
Travel with Children	33%	34%	41%	36%	45%	35%	44%	38%	47%	27%	54%	37%	34%	33%
Average Children	1.9	1.8	2.3	2.1	2.3	2.1	2.1	2.2	2.6	1.9	2.3	2.3	2.1	1.9
Travel with Children from Household	29%	29%	38%	31%	42%	31%	42%	34%	43%	25%	51%	33%	31%	29%
Average Children from Household	1.7	1.6	2.1	1.8	2.2	1.8	2.0	1.8	2.4	1.9	2.2	1.9	2.0	1.7

Utah visitors spent slightly less than the previous year



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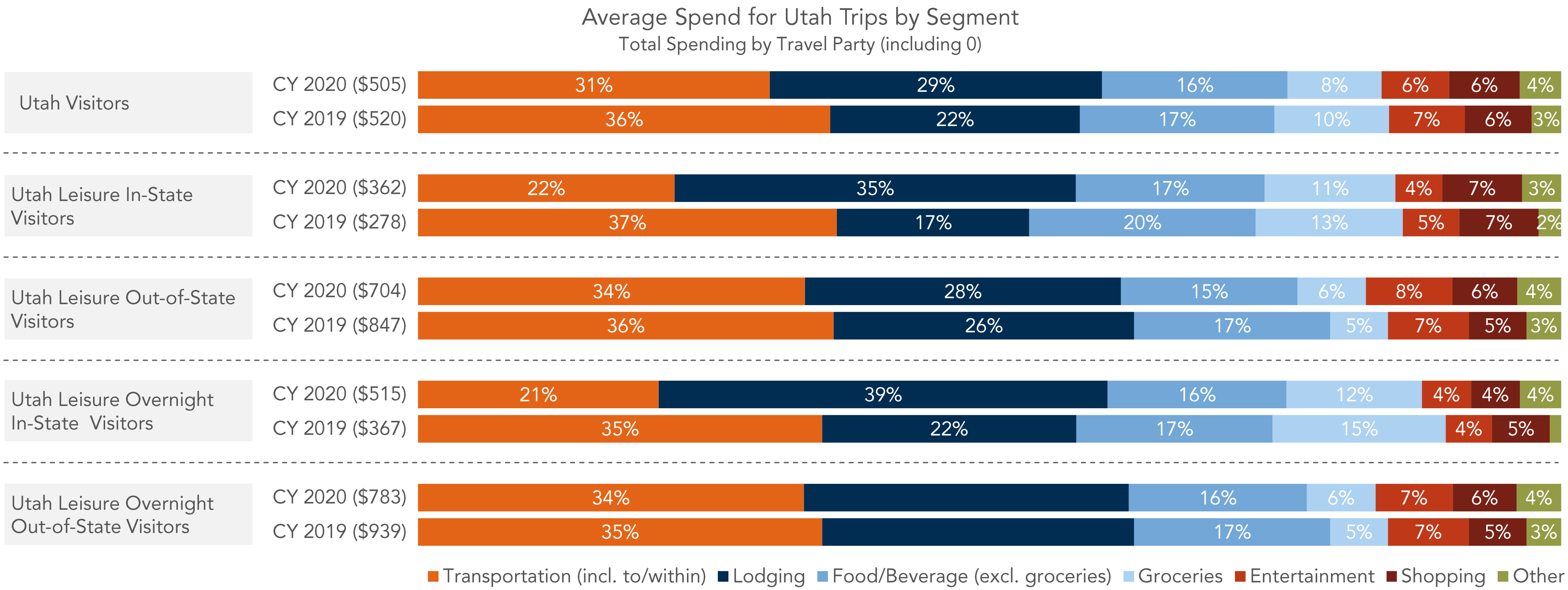
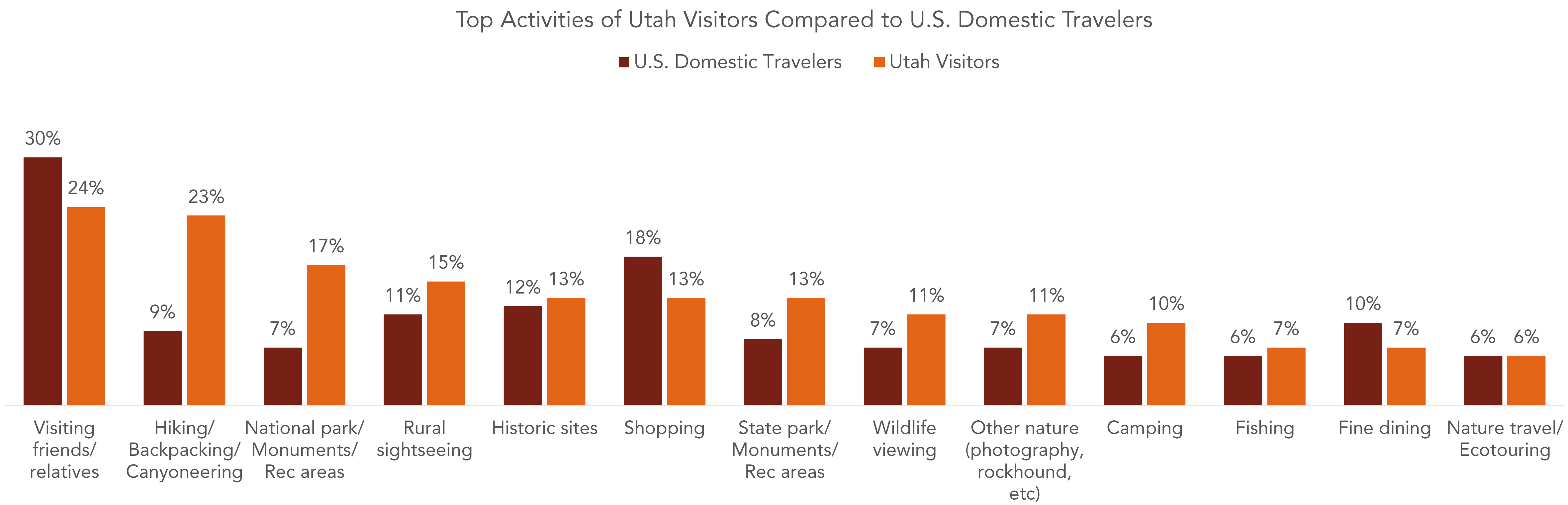
Note: Transportation includes transportation to/within the state
*Small sample

Utah residents spent more on leisure travel within the state, while out-of-state residents spent less



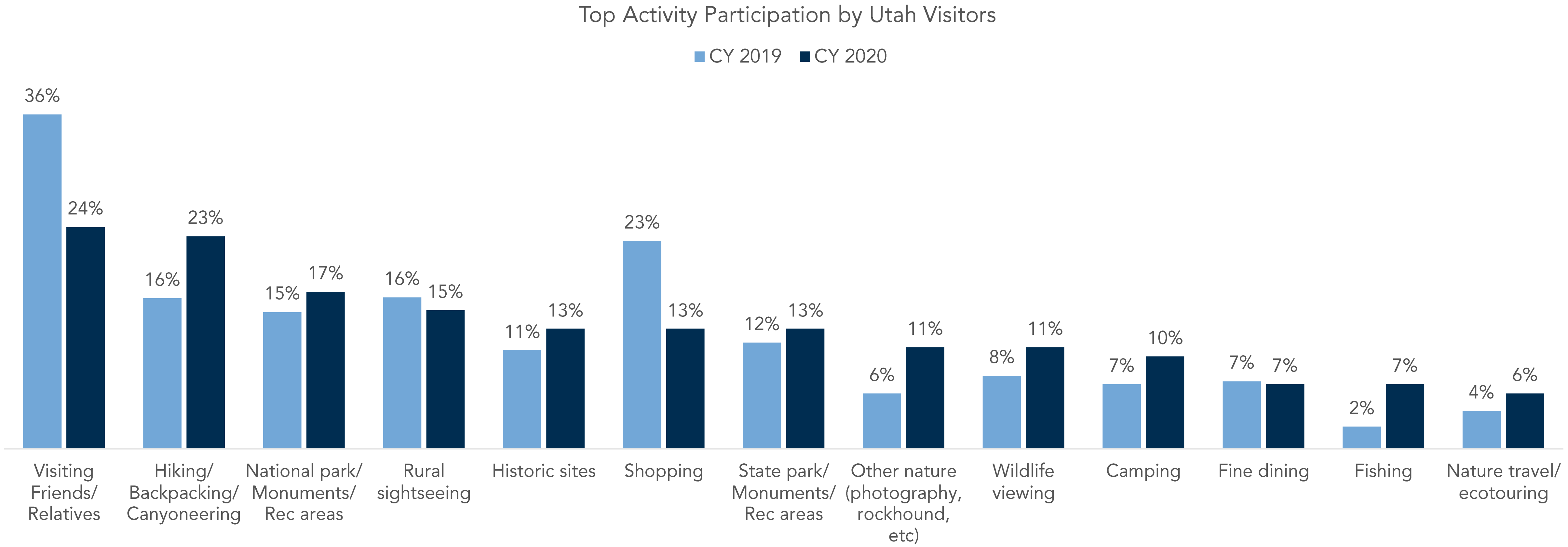
Note: Transportation includes transportation to/within the state
*Small sample

Utah visitors participate more in outdoor and nature activities than overall U.S. domestic travelers



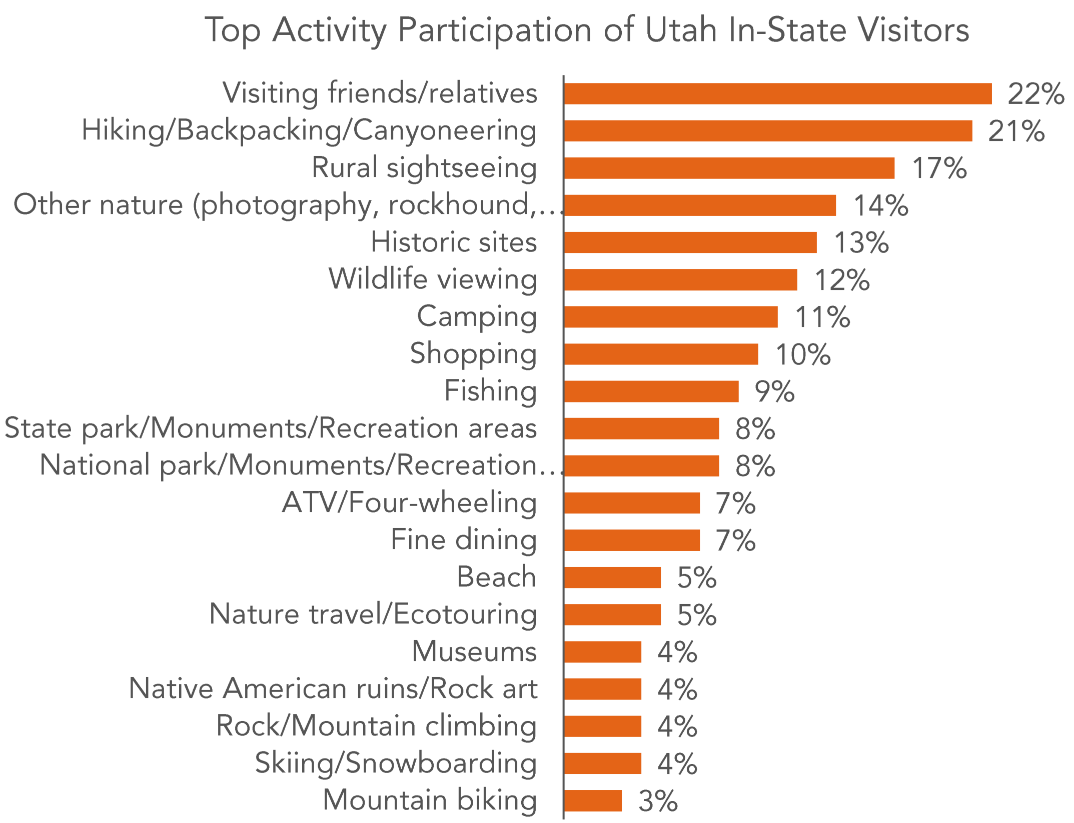
Note: activity percentages reflect any participation and not the activity as a motivation their trip

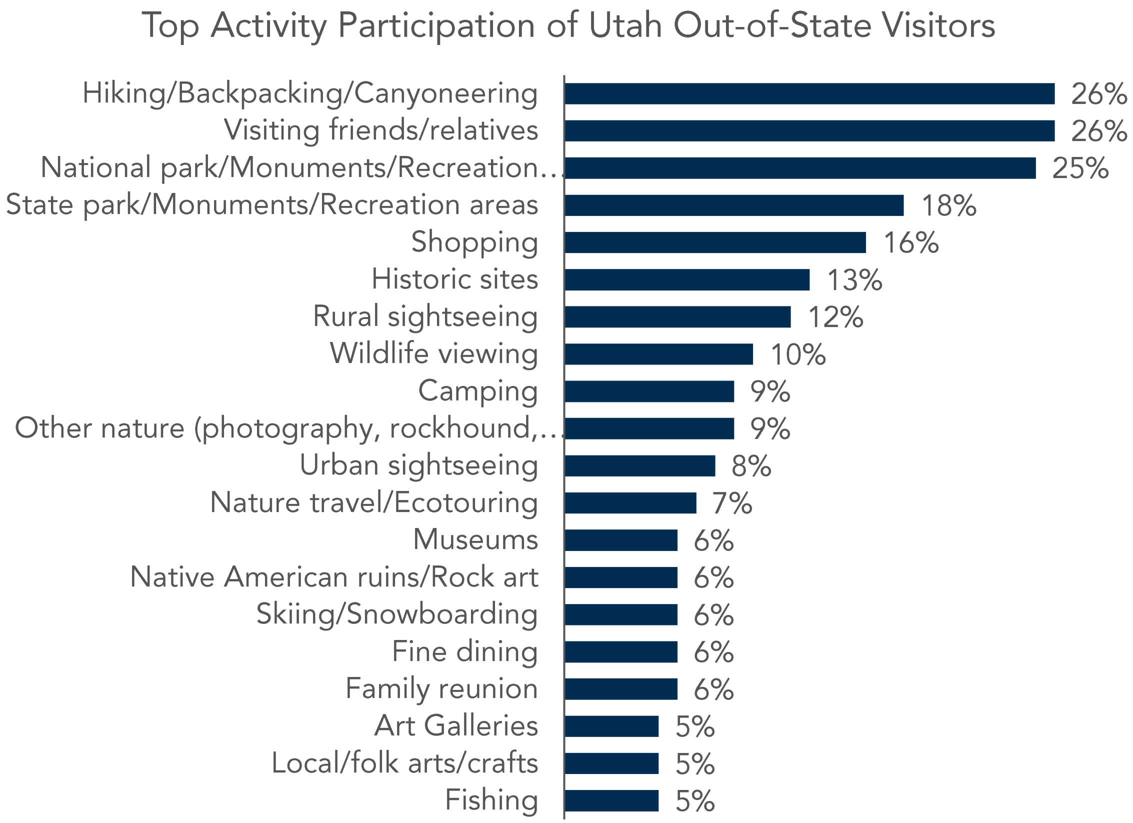
Outdoor activity participation surges among visitors to Utah



Note: activity percentages reflect any participation and not the activity as a motivation their trip

Utah's in-state and out-of-state visitors enjoy different activities





Note: activity percentages reflect any participation and not the activity as a motivation their trip

NICHE VACATION MOTIVATIONS

Niche activities can be leveraged to motivate travel to Utah

Visitor characteristics vary between the niche activities motivating travel:

- Adventure Seekers: 20% of leisure trips, youngest, second highest spend
- State/National Parks: 18% of leisure trips, most overnights, highest spend, highest income, most likely to be from non-regional state
- Outdoor Recreationalists: 17% of leisure trips, longest stay, largest travel party, most family travel parties
- Nature & Rural Explorers: 16% of leisure trips, oldest, most without children
- Arts & Culture: 11% of leisure trips, second youngest, shortest stay
- Entertainment: 12% of leisure trips, most Utah residents, second shortest stay
- Family & Friends: 30% of leisure trips, most neighbor states

	Utah Leisure Visitors	Travelers Motivated by Niche Activity to Visit Utah:								
		Arts & Culture	State/National Parks (Net)	State Parks	National Parks	Adventure Seekers	Outdoor Recreationalist	Nature & Rural Explorers	Entertainment	Family & Friends
% of Leisure Trips	100%	11%	18%	8%	14%	20%	17%	16%	12%	30%
Demographics:										
Average Age	42.0	39.1	44.8	43.7	45.5	38.5	39.7	47.2	44.3	42.1
Average Household Income	$93,300	$97,200	$109,600	$114,300	$107,800	$99,100	$84,900	$96,400	$97,600	$87,700
Children <18 in Household	40%	45%	34%	38%	33%	44%	50%	23%	39%	48%
Married	69%	75%	69%	67%	69%	70%	73%	81%	69%	75%
Utah Resident	50%	52%	25%	33%	21%	43%	60%	61%	65%	44%
Neighbor State Resident	23%	19%	19%	18%	20%	22%	23%	14%	18%	32%
Trip Characteristics										
Overnight Stay	75%	59%	92%	88%	96%	89%	89%	71%	63%	81%
Average Nights (excl. 0)	3.6	2.6	3.9	3.2	4.0	3.6	4.0	3.7	2.9	3.9
Average Travel Party Size	3.1	3.0	3.4	3.7	3.2	3.3	3.7	2.4	3.1	3.2
Family Travel Party	31%	37%	27%	30%	26%	31%	44%	17%	31%	37%
Average Spend (per trip/party)	$532	$373	$880	$825	$949	$820	$562	$492	$550	$444

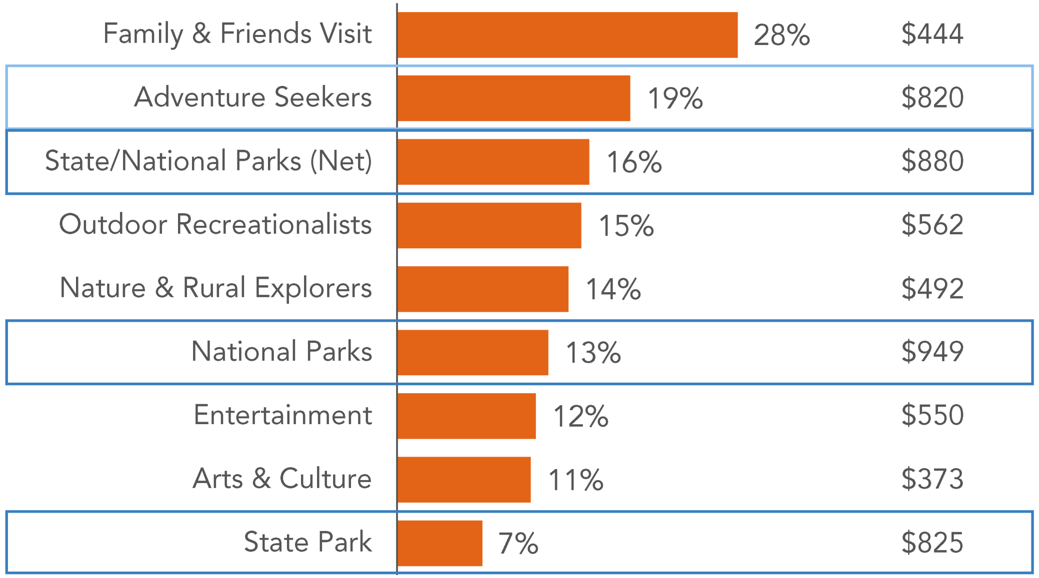
Note: niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it's possible for an activity as a primary reason and secondary reason for visit to fall in different niches, some overlap will exist

Travelers motivated to visit Utah for niche activities provide value and contribute to total spending in the state

The most lucrative niche activity segments:

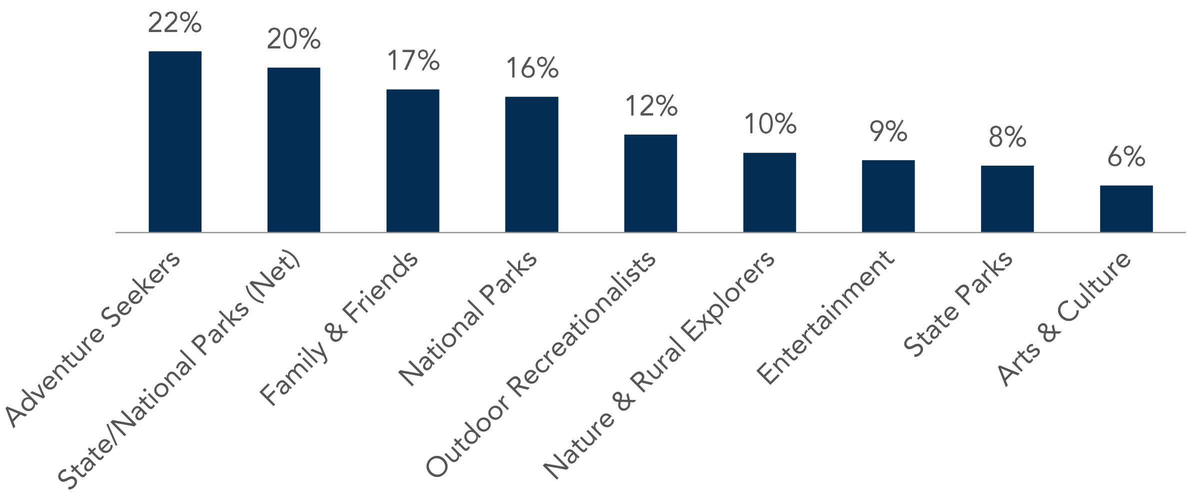
- State/National Parks and Adventure activity niches offer the most potential value outside of those who visit family/friends. In particular, the National Parks niche draws visitors in from farther away and is enhanced further by above average spending and longer stays

Share of Utah Visitors Motivated to Travel by Niche Activity | Average Spend



% of Estimated Potential Value for Niche Vacation Motivations

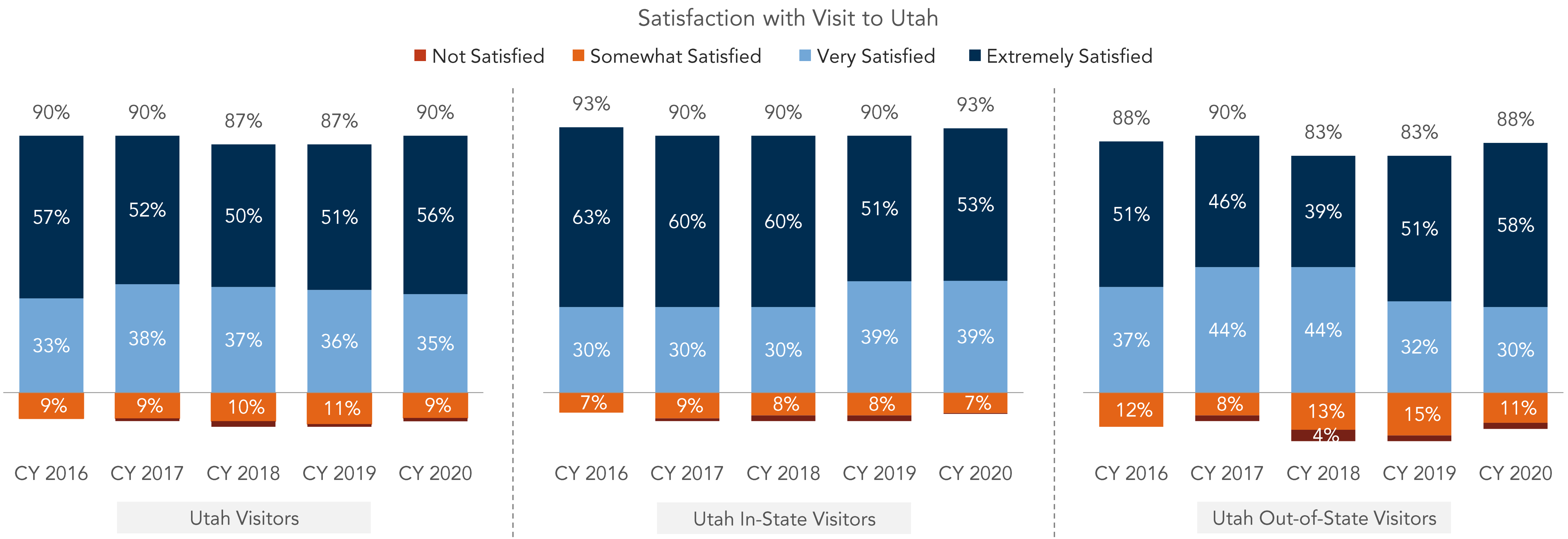
Estimated value reflects the proportion of potential spend, calculated by the share each niche comprises of Utah visitors, multiplied by average spend per niche. Chart figures represent potential amount a niche contributes to total Utah trip spend.



Note: niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it's possible for an activity as a primary reason and secondary reason for visit to fall in different niches, some overlap will exist

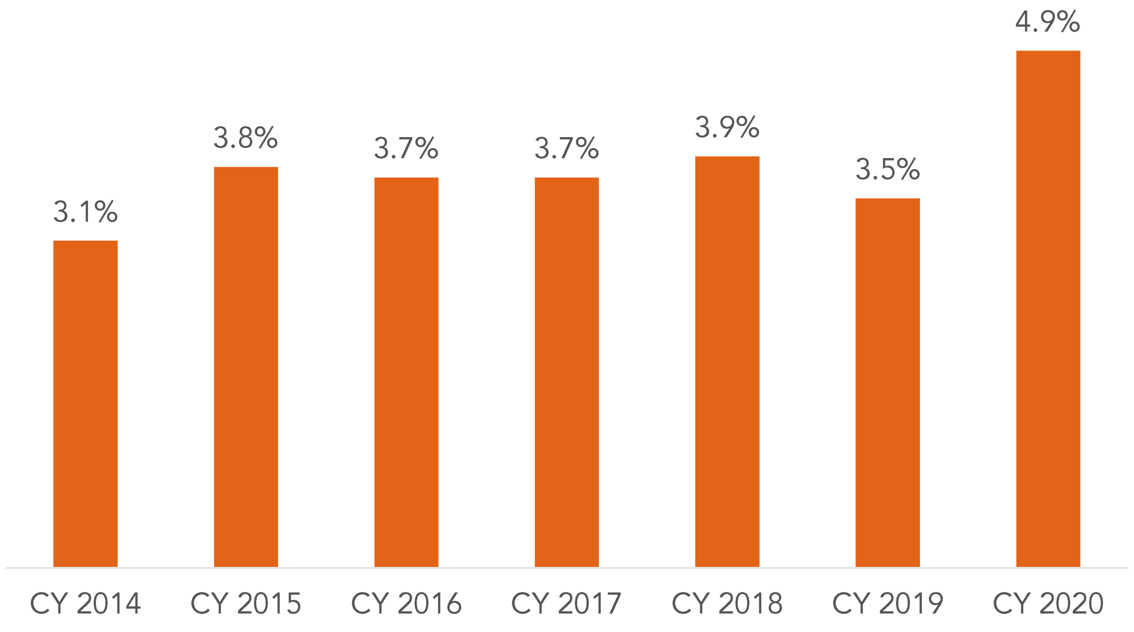
Trip Satisfaction & Travel Intent

Utah visitor satisfaction improves after several years of lower net positive ratings

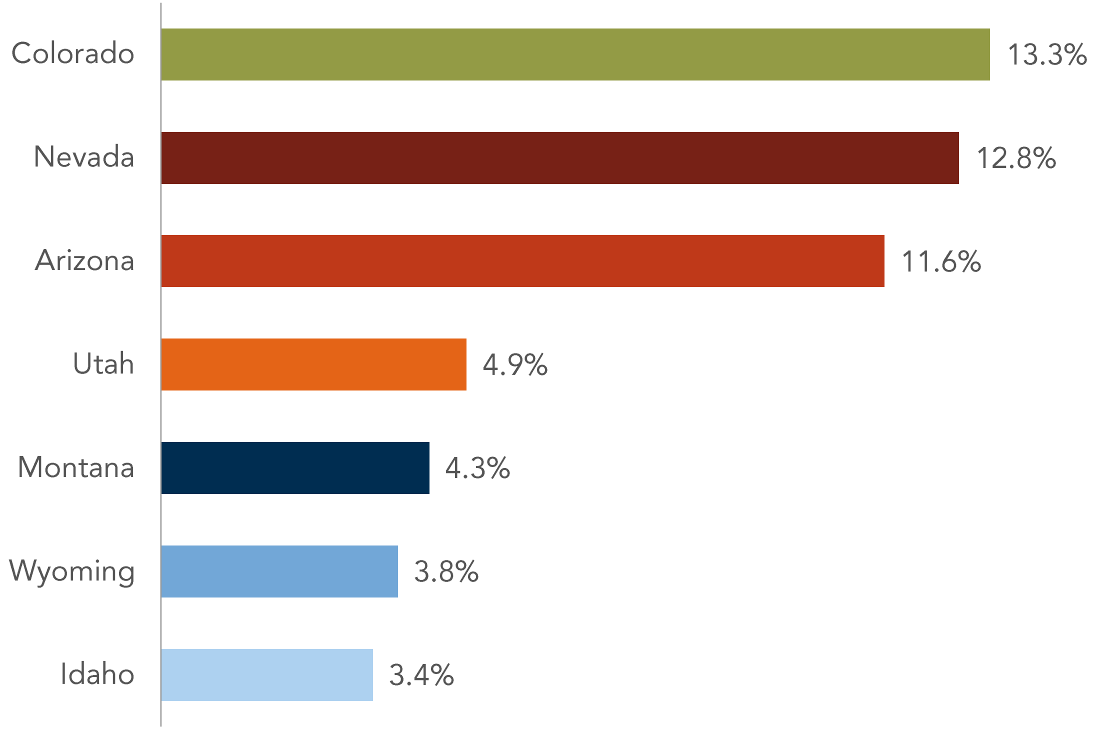


Leisure travel intent to visit Utah surges among travelers

Planning Utah Leisure Trip within Next 2 Years



States Plan to Visit for Leisure within Next 2 Years



DEMOGRAPHICS

Utah visitors tend to be younger and have a higher household income than U.S. domestic travelers

	U.S. Domestic Travel		Utah Visitors		Utah Business Visitors*		Utah Leisure Visitors		Utah Leisure In-State Visitors		Utah Leisure Out-of-State Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors	
	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2019
Age																
18 - 24	8%	10%	7%	13%	7%	7%	7%	13%	8%	10%	7%	16%	9%	14%	5%	9%
25 - 34	24%	25%	34%	29%	20%	22%	37%	31%	43%	35%	31%	26%	41%	31%	29%	29%
35 - 44	19%	19%	19%	17%	15%	31%	19%	17%	19%	16%	19%	18%	14%	15%	30%	21%
45 - 54	16%	14%	12%	11%	46%	15%	11%	11%	8%	10%	14%	12%	10%	12%	12%	10%
55+	33%	33%	28%	29%	12%	25%	26%	28%	23%	29%	29%	28%	26%	27%	25%	32%
Average	45.7	44.7	44.2	42.1	44.8	43.8	42.5	42.0	40.9	42.3	44.6	41.6	42.0	41.4	43.7	43.8
Income																
Less than $50,000	25%	27%	22%	19%	18%	24%	22%	17%	21%	15%	25%	21%	24%	17%	19%	22%
$50,000 - $74,999	24%	24%	32%	22%	6%	36%	35%	20%	48%	24%	20%	16%	32%	17%	44%	31%
$75,000 - $99,999	18%	18%	21%	25%	48%	14%	15%	26%	16%	34%	15%	19%	14%	29%	19%	17%
$100,000 - $149,999	22%	20%	17%	22%	11%	21%	18%	24%	12%	22%	25%	24%	19%	24%	16%	20%
$150,000 or more	11%	11%	8%	12%	17%	4%	9%	12%	3%	5%	16%	20%	12%	13%	2%	9%
Average	$86,030	$84,700	$79,760	$91,700	$96,410	$77,800	$79,420	$93,200	$69,050	$85,800	$92,560	$101,700	$82,350	$95,200	$72,560	$85,100

*Small sample size

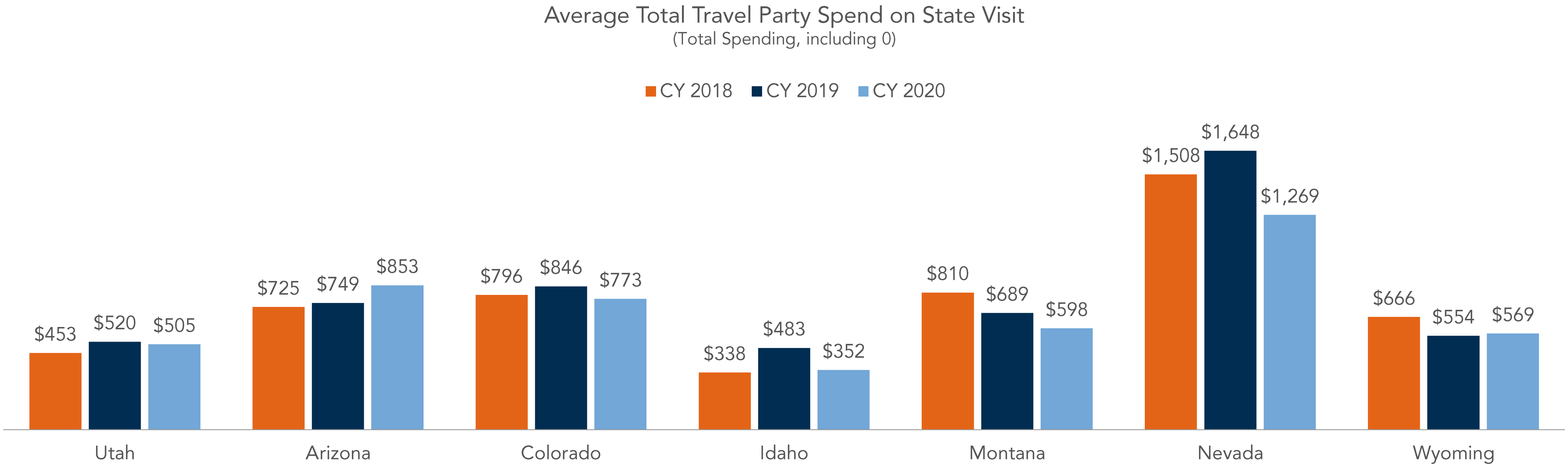
Ethnic diversity increase among visitors to Utah

	U.S. Domestic Travel		Utah Visitors		Utah Business Visitors*		Utah Leisure Visitors		Utah Leisure In-State Visitors		Utah Leisure Out-of-State Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors	
	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020
Now Married	61%	59%	68%	69%	45%	73%	70%	69%	77%	79%	62%	58%	69%	68%	72%	70%
Never Married	25%	27%	20%	24%	52%	25%	18%	24%	11%	15%	27%	33%	20%	25%	14%	22%
Household Composition																
One Person	14%	14%	10%	8%	47%	6%	8%	8%	7%	5%	8%	12%	6%	8%	11%	9%
Two People	38%	36%	32%	39%	18%	33%	33%	40%	23%	45%	46%	35%	36%	39%	25%	44%
Three People	20%	20%	18%	19%	12%	16%	17%	19%	17%	19%	17%	19%	19%	19%	13%	19%
Four People	17%	19%	20%	17%	7%	21%	20%	16%	26%	14%	14%	19%	20%	19%	21%	10%
Five or More People	12%	12%	20%	17%	15%	24%	22%	16%	27%	17%	16%	16%	19%	16%	30%	17%
Children																
Children in Household	39%	40%	46%	41%	40%	55%	49%	40%	58%	41%	38%	40%	48%	41%	51%	38%
Ethnicity/Hispanic																
White/Caucasian	85%	86%	93%	89%	97%	90%	92%	88%	97%	94%	86%	82%	90%	87%	96%	90%
African-American	6%	5%	1%	2%	0%	4%	1%	2%	0%	0%	2%	4%	1%	2%	0%	2%
Asian/Pacific Islander	4%	5%	2%	6%	0%	6%	2%	7%	1%	4%	4%	10%	2%	8%	2%	4%
Hispanic	9%	8%	5%	9%	6%	4%	6%	9%	4%	9%	9%	8%	8%	9%	2%	7%

*Small sample size

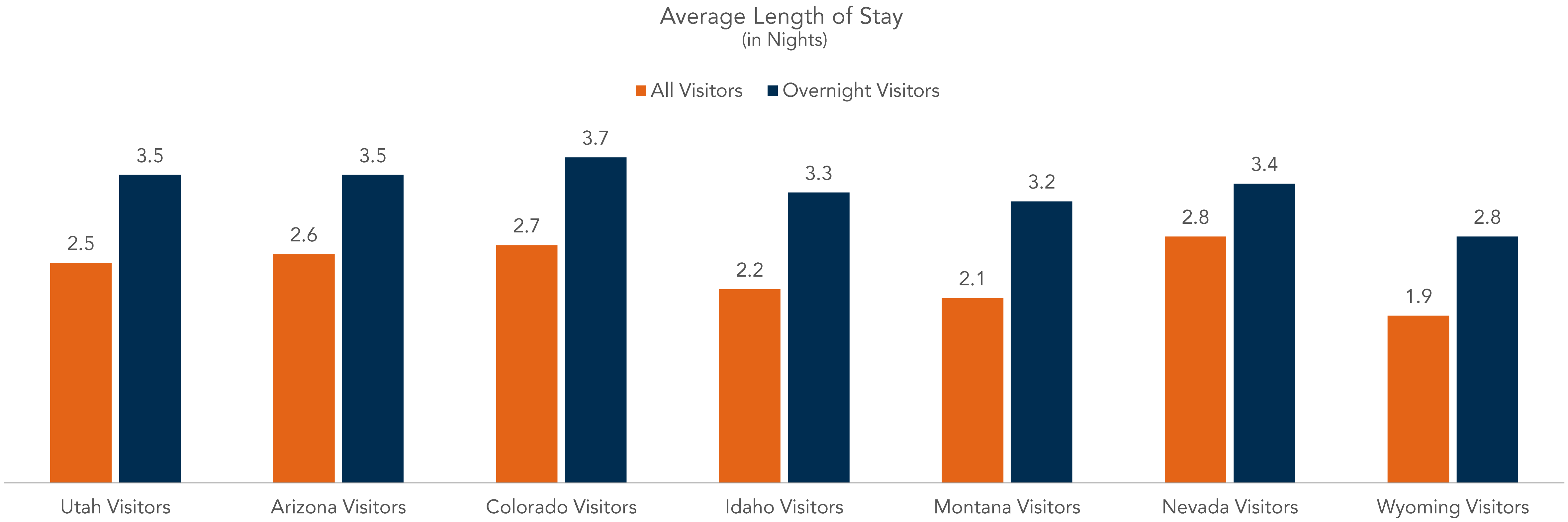
COMPETITIVE ENVIRONMENT

Utah trails nearly all regional competitor states in terms of the average amount visitors spend



Omnitrak

Length of stay among Utah's overnight visitors is relatively similar to most neighbor states

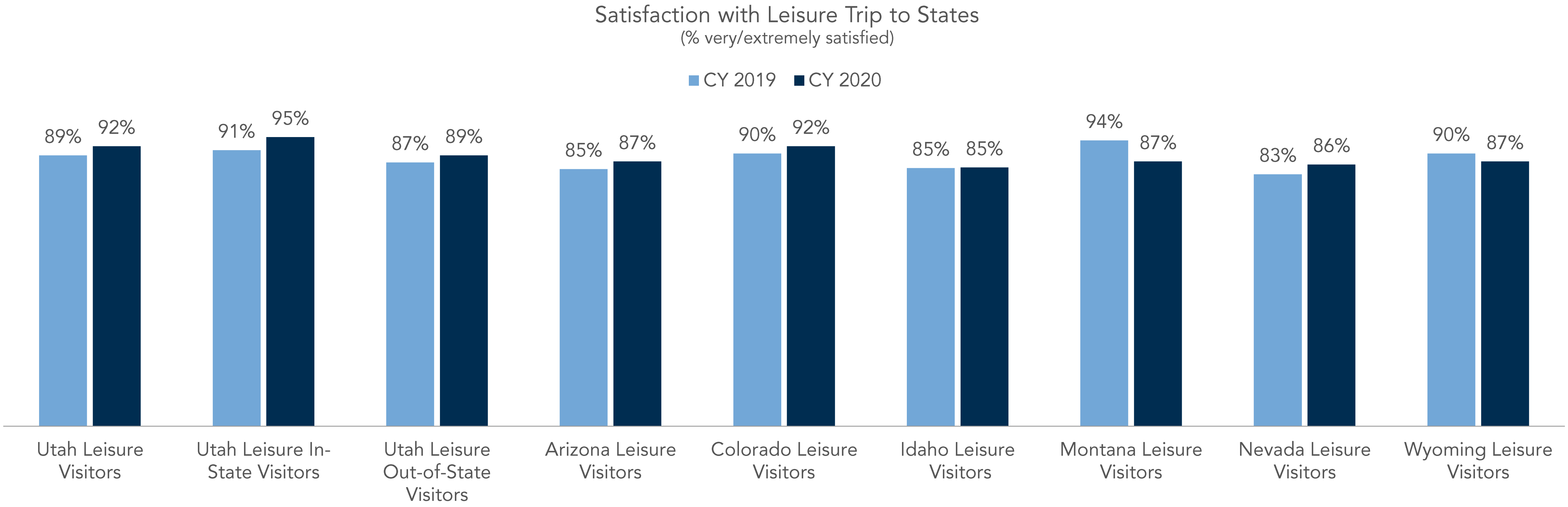


Omnitrak

Utah continues to host larger travel parties, on average than nearby states, despite a reduction in the proportion of family travel parties

	Utah Visitors		Arizona Visitors		Colorado Visitors		Idaho Visitors		Montana Visitors		Nevada Visitors		Wyoming Visitors	
	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020
Average Travel Party Size	3.2	3.0	2.7	2.8	2.7	2.9	2.7	2.9	2.8	2.7	2.7	2.8	2.8	2.8
Adults in Travel Party														
One Adult	21%	18%	33%	31%	34%	30%	18%	26%	18%	29%	24%	21%	25%	30%
Two Adults	58%	65%	51%	52%	50%	54%	69%	56%	63%	57%	56%	56%	56%	51%
Three Adults	11%	10%	8%	7%	7%	6%	7%	11%	12%	5%	7%	12%	4%	12%
Four or More Adults	10%	8%	9%	10%	9%	10%	6%	7%	7%	7%	13%	10%	15%	8%
Family Travel														
Travel with Children	41%	36%	38%	39%	32%	40%	34%	40%	33%	37%	23%	27%	25%	40%
Average Number of Children	2.3	2.1	1.9	1.8	2	1.7	2	1.9	2.1	1.7	1.9	1.8	2	1.8
Travel with Children from Household	38%	31%	35%	34%	29%	35%	31%	35%	31%	32%	21%	23%	24%	37%
Average Number of Children from Household	2.1	1.8	1.7	1.6	1.8	1.6	1.9	1.7	1.9	1.6	1.7	1.7	1.7	1.6

Utah performs well among competitors in terms of leisure trip satisfaction, with increased satisfaction among both in-state and out-of-state visitors



Omnitrak

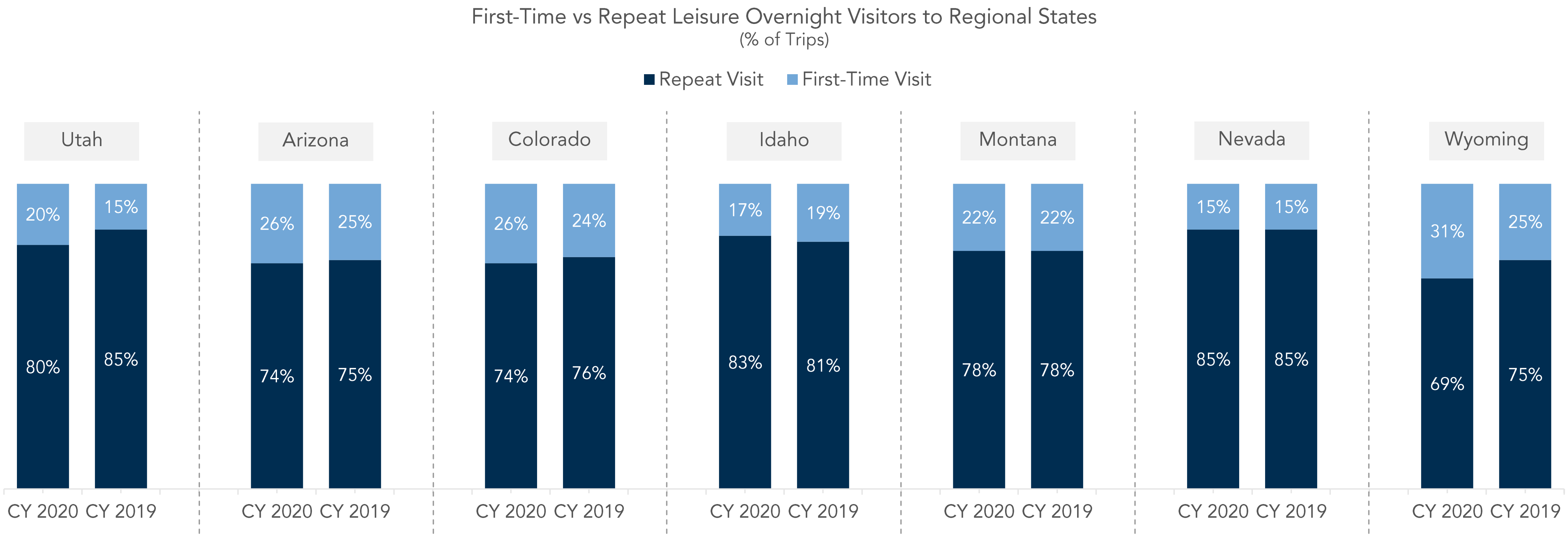
Salt Lake City continues to be Utah's top destination, but the popularity of Utah destinations differs between in-state and out-of-state visitors

Utah Visitor Destinations	CY 2019	CY 2020
Salt Lake City	30%	27%
Other	16%	21%
St. George	15%	16%
Provo/Orem	21%	11%
Park City	5%	10%
Bryce Canyon	6%	10%
Moab	7%	9%
Zion/Springdale	5%	9%
Cedar City	12%	9%
Logan	5%	8%
Ogden	5%	6%
Brigham City	4%	5%
Kanab	4%	5%
Davis County/Lagoon	6%	4%
Vernal	1%	3%
Torrey/Capitol Reef	2%	3%
Escalante/Boulder	2%	2%
Garden City/Bear Lake	1%	2%
Monument Valley/Monticello/Mexican Hat	4%	2%
Dutch John/Flaming Gorge	0%	1%

Utah In-State Visitor Destinations	CY 2019	CY 2020
Other	24%	27%
Salt Lake City	23%	20%
St. George	8%	13%
Park City	4%	12%
Logan	6%	12%
Provo/Orem	21%	10%
Brigham City	6%	7%
Ogden	7%	6%
Cedar City	6%	6%
Davis County/Lagoon	10%	5%
Moab	3%	4%
Zion/Springdale	2%	4%
Bryce Canyon	1%	4%
Vernal	3%	3%
Kanab	2%	3%
Garden City/Bear Lake	1%	2%
Torrey/Capitol Reef	1%	1%
Escalante/Boulder		1%
Dutch John/Flamingo Gorge	1%	0%
Monument Valley/Monticello/Mexican Hat	0%	0%

Utah Out-of-State Visitor Destinations	CY 2019	CY 2020
Salt Lake City	45%	34%
St. George	22%	19%
Provo/Orem	14%	16%
Cedar City	9%	14%
Moab	15%	14%
Bryce Canyon	9%	14%
Zion/Springdale	20%	12%
Other	17%	12%
Monument Valley/Monticello/Mexican Hat	7%	9%
Park City	6%	7%
Kanab	4%	5%
Ogden	5%	5%
Escalante/Boulder	4%	4%
Logan	2%	4%
Torrey/Capitol Reef	3%	4%
Brigham City	1%	3%
Davis County/Lagoon	8%	3%
Vernal	0%	2%
Garden City/Bear Lake	0%	2%
Dutch John/Flamingo Gorge	0%	1%

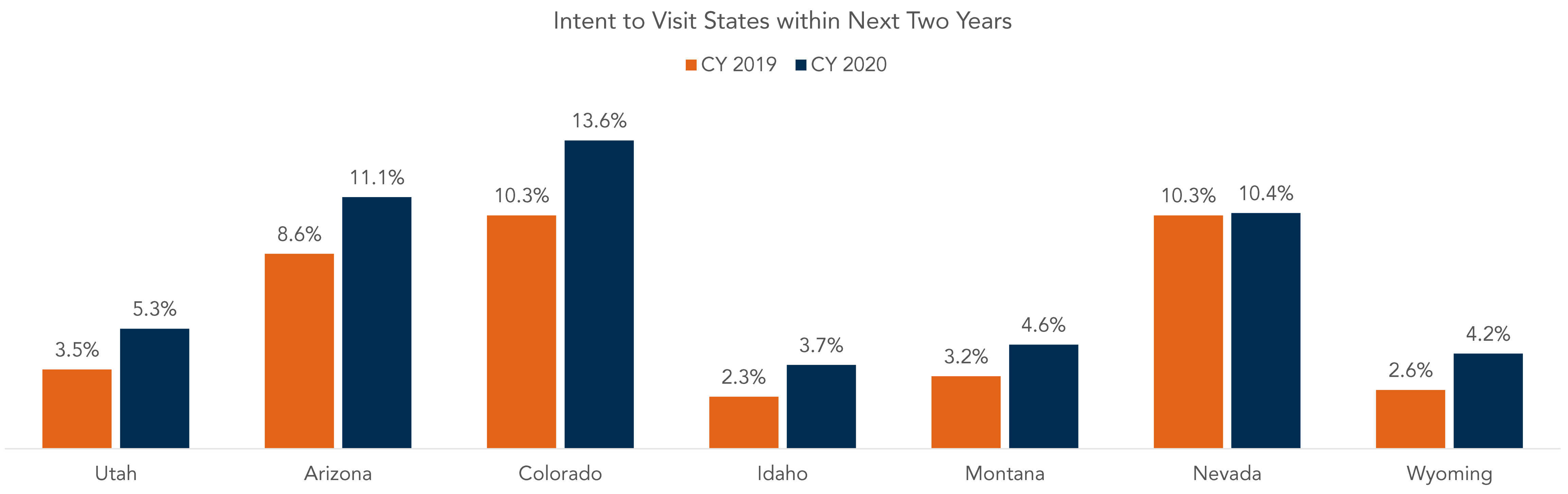
Utah maintains its strong repeat visitor base, while observing an increase in its proportion of first-time visitors



Omnitrak

Note: only respondents who stayed overnight in a state are asked about first-time and repeat visit state visits

Leisure travel intent to visit Utah and all nearby competitor states increases



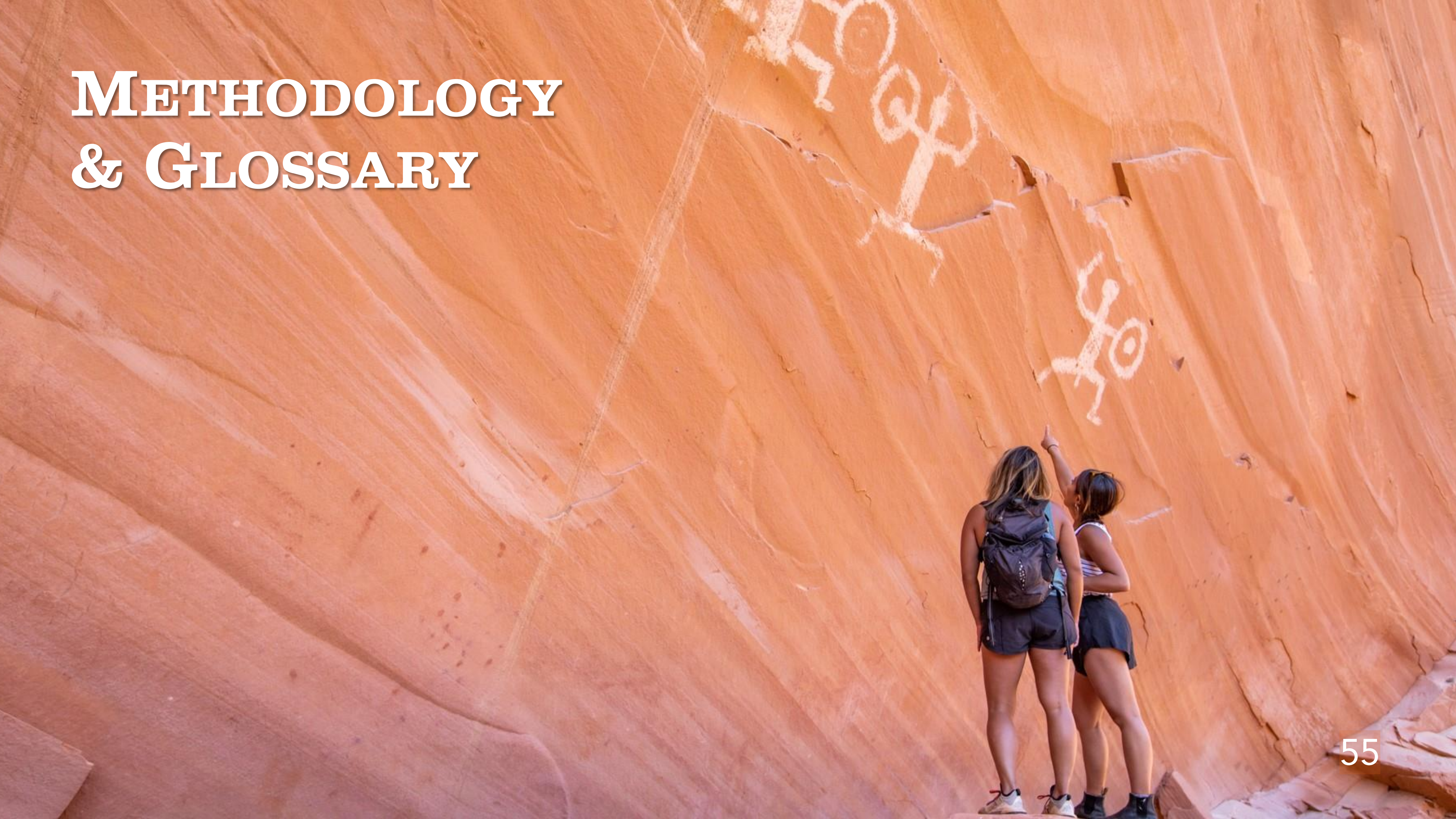
Omnitrak

Note: figures based on all respondents qualifying for the survey by having traveled in the previous month

Utah visitors tend to have a higher average income than competitor states

	Utah Visitors		Arizona Visitors		Colorado Visitors		Idaho Visitors		Montana Visitors		Nevada Visitors		Wyoming Visitors	
	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020	CY 2020	CY 2020	CY 2019	CY 2020	CY 2019	CY 2020
Average Age	44.2	42.1	44.3	43.7	44.0	41.3	45.6	42.9	49.5	44.0	46.1	45.2	51.0	43.4
Average Household Income	$79,800	$91,700	$92,000	$88,200	$86,500	$90,000	$75,800	$73,600	$71,300	$72,900	$92,300	$91,600	$79,600	$76,900
Marital Status														
Now Married	68%	69%	63%	60%	60%	61%	71%	66%	75%	60%	57%	61%	67%	61%
Never Married	20%	24%	24%	26%	25%	28%	17%	22%	16%	23%	30%	26%	28%	27%
Family														
Children in Household	46%	41%	44%	45%	39%	47%	48%	47%	37%	42%	36%	40%	28%	47%
Household Composition														
One Person	10%	8%	13%	15%	15%	14%	8%	10%	9%	15%	15%	12%	15%	12%
Two People	32%	39%	35%	33%	37%	33%	39%	35%	48%	35%	35%	35%	52%	32%
Three People	18%	19%	18%	19%	20%	24%	25%	20%	15%	19%	20%	17%	12%	22%
Four People	20%	17%	19%	21%	17%	18%	18%	21%	14%	22%	16%	22%	15%	17%
Five or More	20%	17%	16%	12%	11%	10%	11%	14%	12%	9%	13%	15%	6%	18%
Ethnicity/Hispanic Origin														
Caucasian	93%	89%	86%	84%	91%	89%	91%	95%	96%	92%	75%	72%	97%	91%
African-American	1%	2%	4%	4%	3%	3%	2%	0%	1%	0%	8%	7%	0%	0%
Asian/Pacific Islander	2%	6%	3%	7%	3%	5%	2%	2%	2%	5%	11%	14%	2%	4%
Hispanic	5%	9%	14%	16%	11%	9%	6%	7%	3%	4%	14%	14%	3%	5%

Methodology & Glossary



TravelTrakAmerica Syndicated Research

TravelTrakAmerica is a comprehensive national travel study of U.S. households focusing on domestic travel. The syndicated study collects general information on travelers (e.g., demographics, perceptions, travel intent) and detailed information about past-month travel.

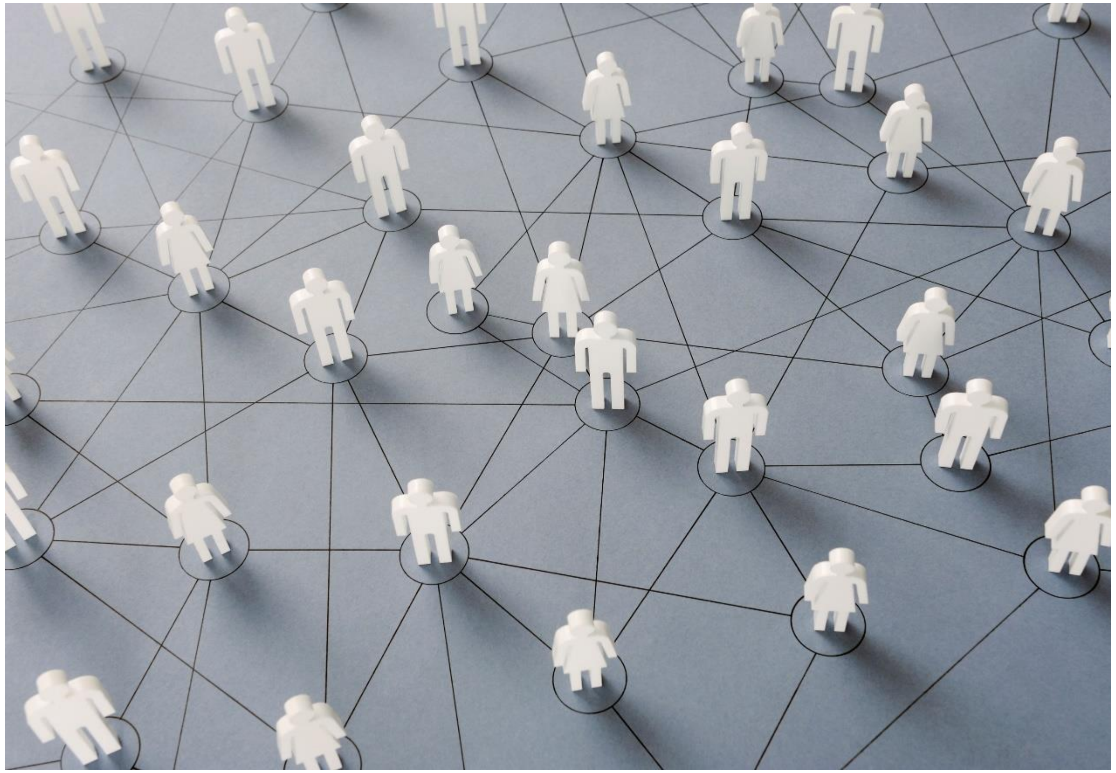
Methodology:

Omnitrak sources survey respondents from a single managed panel provider to administer the monthly TravelTrakAmerica survey to a nationally representative sample of U.S. households.

Each month a variety of general information (e.g., demographics, perceptions, travel intent, etc.) is collected from more than 9,000 U.S. travelers. “Travelers” are defined as having taken one or more trip(s) more than 50 miles from home (each-way, excluding commuters) during the past 12 months.

Details about trips taken during the past-month are collected from approximately 4,000 travelers who took at least one trip in the prior month. To ensure the survey captures all destinations visited to the best of its ability, when asked where they went in a state, respondents are provided with an option to type in the destination they visited.

Sample



Sample Collections: January - December

	2019 Unweighted	2019 Demographic Weighted	2020 Unweighted	2020 Demographic Weighted
Total U.S. Travelers Respondents	117,627	126,308	108,273	117,480
Total U.S. Domestic Travelers Trips	58,003	65,609	38,611	42,467
Total Utah Visitors	549	765	530	663
Utah In-State Visitors	277	444	236	308
Utah Out-of-State Visitors	272	321	294	355

Glossary

Term	Definition
Origin DMA	Designated Market Area: areas where respondents live that share the same primary TV broadcast signals (210 DMAs in US).
Person-Trip	Total person-trips are all trips taken by all people; i.e., a couple taking three trips counts as six (two people, each taking three trips).
Trip	Travel 50+ miles (one-way) away from home or overnight. Excludes commuters or commercial travel (i.e., flight attendants, commercial vehicle operator).
U.S. Travelers	U.S. residents who have taken at least one "trip" during the past 12 months.
U.S. Domestic Travel	U.S. residents who visited at least one U.S. destination on a "trip".
Utah Visitor	A U.S. traveler who visited Utah during the specified time period.
Niche Vacation Motivation	An activity or group of activities a Utah visitor participated in during their visit, where the niche activity or at least one activity within the niche activity group was a primary or secondary reason for their visit. Niche vacation motivations listed below with activities defining each.
Outdoor Recreationalists	Activities include camping, biking, fishing, horse ridding, kayaking/canoeing/paddleboarding, sailing, ATV/4-wheeling, golf, boating, other snow activities
Adventure Seekers	Activities include hang gliding/skydiving/base jumping, hiking/backpacking/canyoneering, mountain biking, mountain climbing, skiing/snowboarding, whitewater rafting, water skiing, windsurfing/kiteboarding
Nature & Rural Explorers	Activities include bird watching, nature travel/eco-touring, wildlife viewing, other nature, farms/agri-tours, rural sightseeing
Arts & Culture	Activities include art galleries, historic sites, Native American ruins, museums, theater, symphony/concert, music festival, local/folk art/craft, TV/movie location
Entertainment	Activities include urban sightseeing, zoos/aquariums, attractions, fine dining, unique local cuisine, gardens, nightclubs/dancing, wine tasting/winery, craft breweries, special event, major professional sports, amateur/collegiate/other sports events (spectator), shopping, spa/health club, motor sports
State/National Parks	Activities include state park/monument/recreation areas, national park/monument/recreation area
Family/Friends	Activities include visiting friends/relatives, family reunion.

TravelTrakAmerica Client Service Team

Chris Kam

President & COO

Chris leads the overall continued evolution of the TravelTrakAmerica syndicated data set, incorporating new thinking from the marketplace and integrating new technology from Omnitrak's panel provider.

John Packer

Senior VP of Travel & Leisure

John is responsible for working with travel and tourism clients to fully understand their business issues. He engages with team members to design and execute research programs that will help clients succeed.

Lydia Poole

Research Manager

Lydia is the driving force who keeps TravelTrakAmerica moving forward. She lives and breathes the syndicated data and enjoys engaging with clients to help them uncover insights. Prior to joining Omnitrak, Lydia worked for VISIT FLORIDA.

THANK YOU